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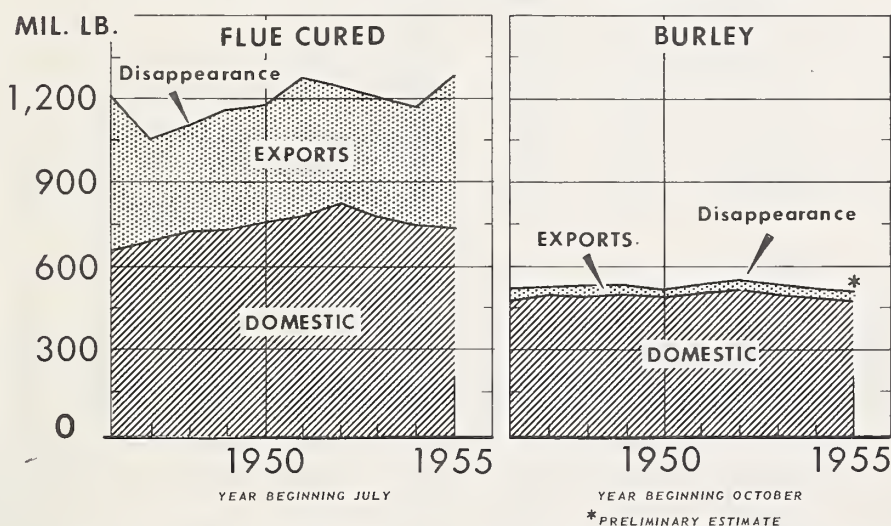
1957 OUTLOOK ISSUE

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1957 Outlook Issue
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U. S. DEPARTMENT OF AGRICULTURE



DOMESTIC USE AND EXPORTS OF MAJOR CIGARETTE TOBACCO



U. S. DEPARTMENT OF AGRICULTURE

NEG. 3470-56 (8) AGRICULTURAL MARKETING SERVICE

Exports of 553 million pounds of flue-cured in 1955-56 about equaled the 1946-47 record. Sales for foreign currencies were a big factor. They also will assist 1956-57 exports, which will probably continue above most postwar years though not as high as 1955-56. Burley exports have held fairly stable.

Domestic use of flue-cured and burley declined around 2 percent from 1954-55 to 1955-56 despite a 2 percent increase in the number of cigarettes manufactured. This apparently resulted

mainly from (1) the increased proportion of filter tips (which require less tobacco per unit of output) and (2) the more complete use of tobacco leaves including stems or midribs--particularly in the form of "processed tobacco" or "reconstituted tobacco."

Cigarette consumption is expected to continue to gain in the year ahead but domestic use of flue-cured and burley seems likely to remain near the 1955-56 level.

UNITED STATES DEPARTMENT OF AGRICULTURE
AGRICULTURAL MARKETING SERVICE

United AMS

STATISTICAL SUMMARY

Item	Unit or base period	1955				1956				Last data available as percentage of a year earlier
		May	June	July	August	May	June	July	August	
Average prices at auctions										
Flue-cured	Cents per lb.	C-1-o-s-e-d		49.7	50.2	C-1-o-s-e-d		48.9	50.8	101
Burley	Cents per lb.	C-1-o-s-e-d				C-1-o-s-e-d				---
Maryland	Cents per lb.	44.9	40.6	36.9	Closed	51.5	51.4	44.1	Closed	120
Fire-cured	Cents per lb.	C-1-o-s-e-d				C-1-o-s-e-d				---
Dark air-cured (35-36)	Cents per lb.	C-1-o-s-e-d				C-1-o-s-e-d				---
Virginia sun-cured (37)	Cents per lb.	C-1-o-s-e-d				C-1-o-s-e-d				---
Parity prices										
Flue-cured	Cents per lb.	53.3	53.3	53.1	52.9	54.3	54.3	54.5	54.7	103
Burley	Cents per lb.	51.3	51.3	51.3	51.3	53.2	53.2	53.4	53.6	104
Maryland	Cents per lb.	53.9	53.9	53.7	53.3	53.6	53.6	53.6	54.0	101
Fire-cured	Cents per lb.	35.5	35.5	35.4	35.2	36.0	36.0	36.2	36.3	103
Dark air-cured (35-36)	Cents per lb.	30.2	30.2	30.1	29.9	30.9	30.9	31.0	31.1	104
Virginia sun-cured (37)	Cents per lb.	33.8	33.8	33.7	33.5	32.9	32.9	33.0	33.1	99
Parity index 1/	1910-44=100	282	282	281	280	286	286	287	288	103
Tax-paid removals										
Cigarettes, small	Billion	34.5	35.6	28.6	36.8	36.2	34.3	31.0		108
Cigars, large	Million	516	510	414	536	554	477	428		103
Chewing and smoking	Mill. lb.	14.0	14.0	10.7	14.0	13.2	11.8	10.0		93
Snuff	Mill. lb.	3.3	3.5	2.4	3.5	3.4	3.2	2.3		96
Accumulated from Jan. 1										
Cigarettes, small	Billion	156	192	220	257	162	196	227		103
Cigars, large	Million	2,237	2,748	3,162	3,698	2,473	2,950	3,378		107
Chewing and smoking	Mill. lb.	65.9	80.0	90.7	104.7	61.6	73.4	83.4		92
Snuff	Mill. lb.	16.8	20.4	22.7	26.2	16.4	19.6	21.9		96
Tax-free removals										
Cigarettes, small	Billion	2.3	2.7	2.4	2.2	2.8	2.9	2.5		104
Cigars, large	Million	7.9	5.8	5.6	8.6	5.6	7.6	5.6		100
Chewing and smoking	Mill. lb.	.3	.3	.4	.4	.4	.4	.2		50
Accumulated from Jan. 1										
Cigarettes, small	Billion	12.6	15.3	17.7	19.9	11.9	14.8	17.3		98
Cigars, large	Million	35.0	40.8	46.4	55.0	25.6	33.2	38.8		84
Chewing and smoking	Mill. lb.	1.7	2.0	2.4	2.8	1.3	1.7	1.9		79
Disposable personal income 2/	Bil. dol.		268.5				284.9			106
Index of industrial production 3/	1947-49=100	138	139	139	140	141	141	136	141	101
Employment	Million	62.7	64.0	65.0	65.5	65.2	66.5	66.7	66.8	102
Labor force employed	Percent	96.2	96.0	96.3	96.7	96.2	95.8	95.9	96.8	100
Exports (farm-sales wt.)										
Flue-cured	Mill. lb.	20.4	22.7	48.9	46.7	31.4	27.0	18.9		39
Burley	Mill. lb.	1.7	1.9	3.1	2.9	3.6	3.8	2.6		84
Maryland	Mill. lb.	.3	.4	.6	.6	1.0	1.0	.6		100
Fire-cured	Mill. lb.	1.4	2.7	2.5	2.4	2.3	2.6	2.6		104
Dark air-cured	Mill. lb.	.5	.5	.5	.3	n.a.	n.a.	.8		160
Cigar	Mill. lb.	.3	.4	.5	.6	n.a.	n.a.	.3		60
Accumulated from beginning of marketing yr. 4/										
Flue-cured	Mill. lb.	406.1	428.8	48.9	95.7	524.7	551.7	18.9		39
Burley	Mill. lb.	22.7	24.6	27.9	30.6	22.1	25.9	28.5		102
Maryland	Mill. lb.	5.8	6.2	6.8	7.4	9.2	10.1	10.7		157
Fire-cured	Mill. lb.	19.3	22.0	24.4	26.8	23.5	25.0	27.7		114
Dark air-cured	Mill. lb.	8.2	8.7	9.2	9.5	n.a.	n.a.	n.e.		---
Cigar filler and binder	Mill. lb.	1.1	1.2	1.4	1.5	n.a.	n.a.	n.a.		---
Cigar wrapper	Mill. lb.	3.8	4.2	.3	.7	4.7	5.1	.3		100
General imports, all commodities	Mill. dol.	959	936	885	960	1,091	1,032	1,050		119
Accumulated from Jan. 1	Mill. dol.	4,572	5,508	6,393	7,353	5,308	6,340	7,390		116
Sterling area gold and dollar reserves 5/	Mill. dol.	2,686	2,680	2,544	2,457	2,369	2,385	2,405	2,276	93
Stocks of domestic types (farm-sales weight) 6/										
Flue-cured	Mill. lb.			2,057				2,258		110
Burley	Mill. lb.			1,473				1,436		97
Maryland	Mill. lb.			74				76		103
Fire-cured	Mill. lb.			152				153		101
Dark air-cured	Mill. lb.			86				91		106
Cigar, filler	Mill. lb.			220				211		96
Cigar, binder	Mill. lb.			130				123		95
Cigar, wrapper	Mill. lb.			18				17		94

1/ Prices paid, interest, taxes, and farm wage rates. 2/ Annual rate, seasonally adjusted. 3/ Seasonally adjusted. 4/ July 1 for flue-cured and cigar wrapper and October 1 for other types. 5/ Held in London. 6/ Dealers' and manufacturers' holdings in United States and Puerto Rico on first day of quarter. n.a.--not available.

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T H E T O B A C C O S I T U A T I O N
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Approved by the Outlook and Situation Board, September 21, 1956

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SUMMARY

Domestic use of the two principal cigarette tobaccos--flue-cured and burley--seems likely to be about the same in 1956-57 as in 1955-56. Although the number of cigarettes consumed probably will continue to increase gradually, the prospects that more leaf will be used are not promising. Available data indicate that manufacturers are producing more cigarettes per pound of tobacco than formerly probably because some filter tip brands require less tobacco per cigarette than nonfilter tip brands and changes in manufacturing permit more complete use of the tobacco leaves, including midribs or stems, as for example, in "processed tobacco sheet."

Exports of unmanufactured tobacco in the 1956-57 marketing year may be around 10 percent less than in 1955-56 when they were the largest since the big quantity shipped in 1946-47. Public Law 480 programs under which foreign currencies were accepted for sales over and above usual takings were a major contributor to the high 1955-56 exports. Foreign currency sales will also assist tobacco exports in the months ahead and the 1956-57 total is expected to exceed that of most postwar years. An influence that is not favorable to tobacco exports is that prices of the traditionally medium-priced grades of tobacco sought by some countries have tended to advance quite sharply in the last year or two because of increased demand in this country. Expanded production of tobacco abroad is increasing the competition for overseas markets. Tobacco exports from this country are adversely affected by various restrictive measures in a number of countries.

Supplies of nearly all kinds of tobacco are large in relation to prospective disappearances. Most kinds of tobacco will be under marketing quotas and acreage allotments in 1957. The 1957 quotas for flue-cured will be announced by the Secretary of Agriculture by December 1 and those for other kinds by February 1. Also, growers having allotments will be able to place some acreage in the "acreage reserve" of the Soil Bank Program. This year, the acreage of the binder types was cut by a reduction in allotments and a substantial additional amount as the result of the Soil Bank Program. For other eligible types, this year's Soil Bank Program had comparatively little effect on production. Greater participation among growers of other types is expected next year since the Program will be started earlier.

Cigarette output in the United States is expected to approximate 425 billion this year--3 percent higher than in 1955 and second only to the record 435 1/2 billion in 1952. Domestic consumption may be 395 billion, almost the same as the 1952 peak but tax-free removals, mainly for overseas forces and exports, are likely to total about 10 billion less than in 1952. The sustained high levels of national employment and personal incomes are favorable factors. The popularity of filter tip cigarettes appears to be still growing even though they are priced 5 to 10 percent higher than non-filter brands. Unless again postponed by legislative action, the Federal tax per pack of 20 will be reduced from 8 to 7 cents on April 1, 1957. Taxes on cigarettes in 42 States and the District of Columbia now average close to 4 cents a pack. Prices of cigarettes in 12 States were raised by higher State taxes in the recent fiscal year.

Cigar consumption in the United States and by overseas forces during 1956 is expected to be at least 6.3 billion--3 or 4 percent above 1955 and the highest since the late 1920's. Cigarillos, which are notably smaller than the traditional average cigar, probably made a sizable contribution to the gain. Some additional increase in cigar consumption seems likely in the year ahead.

The 1956 output of smoking tobacco is estimated at about 73 million pounds--9 percent below 1955 and a new low. With consumer incomes remaining high, the other forms of smoking are likely to continue to be preferred.

The 1956 output of chewing tobacco is estimated at about 77 million pounds--over 2 million below 1955 and the smallest this century. Some further decline seems likely in the year ahead. Output of snuff this year is expected to be near 38 1/2 million pounds--about 2 percent less than in 1955. Little, if any, change is expected for this relatively stable product in the year ahead.

The 1956-57 total supply of flue-cured tobacco slightly exceeds the 1955-56 record. Although this year's estimated production is 13 percent below last year's, this decrease is a little more than offset by the 10 percent increase in carryover. The 1956-57 supply of flue-cured is about 2.9 times prospective disappearance compared with an average of 2.5 for the 5 years prior to 1955-56.

Marketings of the 1956 crop of flue-cured are well along and through September 20, prices averaged 51.8 cents per pound--2.0 percent higher than in the comparable period of last season. Deliveries for Government loans thus far have been about one-half as much as the large amounts last season.

The 1956-57 total supply of burley is only slightly lower than for 1955-56 but 4 percent below the 1954-55 peak. Estimated carryover is 3 percent below a year earlier but this year's crop is indicated to be about 3 percent larger than last year's harvestings. Yields per acre may average above any previous year except 1954. The 1956-57 burley supply is 3.5 times prospective disappearance--slightly less than for 1955-56 and 1954-55 but well above most prior years.

The 1956-57 total supply of Maryland tobacco is now estimated at about 10 percent above 1955-56 and the largest on record. The 1956 production of Maryland tobacco is much larger than last year's storm-reduced crop and may be the largest on record. Government price support will be available to Maryland growers when the 1956 crop is marketed next spring and summer. This will be the first Maryland crop to receive Government price support since 1953. Maryland tobacco exports in 1955-56 were the largest for many years.

The 1956-57 total supply of fire-cured is practically the same as for 1955-56 but the 1956-57 total supply of dark air-cured (including sun-cured) is up 5 percent and the largest for many years. In recent years, about one-half of the fire-cured annual disappearance has been mainly in domestic snuff manufacture and the other half exported. The predominant share of dark air-cured use is in chewing tobacco although some is exported.

The 1956-57 total supply of continental cigar filler (types 41-44) is a little lower than for 1955-56 mainly due to a drop in carryover. However, the 1956 Pennsylvania filler crop (about nine-tenths of continental cigar filler production) is estimated to be 10 percent larger than last year and the largest since 1951.

The 1956-57 total supply of cigar binder types is the smallest on record. It is 11 percent lower than for 1955-56 due both to reduced carryover and about a 26 percent smaller crop. This reduction in supply represents some adjustment towards the reduced requirements for binder leaf resulting from the expanding use of manufactured binder sheet.

Total supplies of shade-grown cigar wrapper tobacco are a little lower than for 1955-56. The drop in carryover more than offset the increase in this year's production over last.

Government price supports for the types of tobacco under marketing quotas are set at 90 percent of parity except for fire-cured which is 75 percent of the burley loan level and dark air- and sun-cured which are 66 2/3 percent of the burley loan level. The application of marketing quotas to the 1957 crops was approved in previous referendums by growers of flue-cured, burley, Maryland, fire-cured, dark air-cured, and sun-cured tobaccos. The growers of cigar filler and binder types (42-44 and 51-55) will vote in a referendum to be held before next planting season on whether they favor marketing quotas on their next 3 crops or are against quotas. At least two-thirds of the growers voting must approve to continue quotas in effect.

The 1956 level of price support for flue-cured is a little higher than for 1955. The 1956 minimum support levels announced last April for burley, fire-cured, and dark air- and sun-cured tobaccos are higher than for the 1955 crops but are lower in the case of the eligible cigar types (42-44 and 51-55). Since the minimums were calculated, parity prices have risen and if the calculated levels as of October 1 are above the announced minimums, they will become the actual supports for these types. Except for flue-cured and Maryland, the great bulk of the tobacco marketings take place from November to March.

TOBACCO PRODUCTS

Cigarettes

Cigarette output in the United States is expected to approximate 425 billion this year--3 percent higher than in 1955 and second only to the record 435 $\frac{1}{2}$ in 1952. The uptrend during the past year is likely to continue and the number of cigarettes manufactured in 1957 should reach a new high. Available evidence indicates that on the average more cigarettes are being made per pound of leaf tobacco. This is occurring because of the larger share of filter tips (that require less tobacco per unit of output) and the more complete use of tobacco leaves including stems or midribs. Therefore, an increase in cigarette numbers in the year ahead may not be accompanied by an increase in the quantity of tobacco used.

It is estimated that 1956 domestic consumption (tax-paid removals) will be about 395 billion--almost 3 $\frac{1}{2}$ percent above 1955 and almost the same as the 1952 peak. The 1956 tax-free removals mainly for overseas forces and commercial exports, are expected to be near 30 billion--not much different from 1955, but 10 billion or 25 percent less than in 1952. This substantial drop occurred mainly because of the reduction in forces stationed overseas during the past 2 years. Commercial exports have dropped only about 1 billion since 1952.

Domestic consumption of cigarettes is expected to continue to make modest gains. The sustained high levels of employment and personal incomes on a national basis are favorable factors. Also, the popularity of filter tip cigarettes is well established and appears to be still growing according to trade sources. Some sources have indicated that filter tips may constitute around 30 percent of total 1956 consumption compared with about 19 percent in 1955 and 10 percent in 1954. Official statistics on the different kinds are not collected.

Cigarette prices at retail have remained almost unchanged for nearly 1 $\frac{1}{2}$ years except where they were raised by increases in State tax rates. In the year ending with June, 11 States advanced their cigarette tax rates and Missouri levied a State cigarette tax for the first time. For the 42 taxing States (and District of Columbia), the tax per pack of 20 cigarettes averages nearly 4 cents. A number of cities including New York, Chicago, St. Louis, Baltimore and others have also had cigarette taxes. Manufacturers have not advanced cigarette prices since April 1955 when prices of king size brands were increased. However, consumers who shift from regular or king size brands to filter tips, which are higher priced, increase their expenditures for cigarettes about 5 or 10 percent.

Table 1.- Cigarettes: Total output, domestic consumption, and exports for specified periods

Period	Total output	Domestic consumption <u>1</u> /	Tax-free removals 2/ Total	Exports
	Billions	Billions	Billions	Billions
Average:				
1925-29	3/107.5	98.2	3/9.3	9.0
1935-39	164.2	157.0	7.2	5.5
1940-44	256.9	223.5	33.3	5.8
1945	332.2	267.2	65.0	6.9
1946	350.0	321.7	30.7	24.1
1947	369.7	335.4	34.3	22.8
1948	386.8	348.5	38.7	25.2
1949	385.0	351.8	33.2	19.5
1950	392.0	360.2	31.8	14.3
1951	418.8	379.7	38.9	16.8
1952	435.5	394.1	40.0	16.4
1953	423.1	386.8	37.0	16.2
1954	401.8	368.7	33.1	15.4
1955	412.5	382.1	30.3	15.1
1956 <u>4</u> /	425.0	395.0	30.0	15.5
			Fiscal year	
Year beginning July				
1951	422.1	384.0	38.2	16.5
1952	436.5	396.9	39.5	17.0
1953	413.6	377.7	35.5	15.6
1954	407.7	375.2	32.5	15.1
1955	416.8	387.1	29.8	15.3

1/ As indicated by tax-paid removals. 2/ In addition to exports, tax-free removals include principally shipments to forces overseas, to United States possession, and ships' stores. 3/ Includes output in bonded factories--of importance in 1925-29, but not in subsequent periods. 4/ Preliminary estimate.

Basic data but not the estimates compiled from reports of the Internal Revenue Service and the Bureau of the Census.

Unless again postponed by legislative action, the Federal tax of 8 cents per pack of 20 will be reduced to 7 cents on April 1, 1957. The 8-cent cigarette tax became effective in November 1951 and originally was to revert to 7 cents on April 1, 1954. However, amending legislation extending the 8-cent tax for another year has been enacted in each of the past 3 years.

Table 2.--Cigarette exports from the United States to leading destinations for specified periods

Country	Calendar year		Year beginning:		January-July		
			July				
	Average:	Average:	1954	1955	1955	1956	1956 as
	1934-38:	1949-53:	1/	1/	1/	1/	percent-
							age of
							1955
	Mil.	Mil.	Mil.	Mil.	Mil.	Mil.	Pct.
Venezuela	39	1,323	1,658	1,819	981	1,063	108
Tangier-Fr. Morocco	12	1,755	1,444	1,082	859	886	103
France	307	518	710	902	597	477	80
Hong Kong	22	100	726	845	501	516	103
Sweden	80	605	585	732	412	460	112
O. Sp. Africa	2/	9	604	612	324	169	52
British Malaya	3	564	470	604	279	389	139
Panama-Canal Zone	389	708	658	581	360	334	93
Spain	16	65	391	575	356	335	94
W. Germany	3/32	322	486	491	278	270	97
Other Countries 4/	3,874	10,698	7,371	7,050	3,973	4,226	106
Total all countries	4,774	16,667	15,103	15,293	8,920	9,125	102

1/ Preliminary. 2/ Less than one half million. 3/ Prewar Germany. 4/ Includes about 90 to 95 foreign destinations in recent years.

Compiled from publications and records of the Bureau of the Census.

The number of people in age groups having the largest proportions of cigarette smokers are increasing slowly from year to year and some additional consumption can be expected from new smokers. From 1955 to 1960, the population 15 years and over is increasing at about an annual rate of 1.2 percent--that is about 1.4 million persons each year. About 55 percent of this increase is accounted for by the added numbers of females aged 55 and over; males and females, 15-17; and males, 65 and over. All of these groups have comparatively low percentages of cigarette smokers. Another 20 percent is represented by additions of females aged 18-54, a group with a significant percentage of cigarette smokers, but still far less than in the case of males. The remaining 25 percent of the 1.4 million are being added yearly to males aged 18-64--the part of the population with a relatively high proportion of cigarette smokers. Not only do certain age and sex groups have smaller proportions of cigarette smokers than others, but also such smokers average fewer cigarettes daily than, for example, the male cigarette smokers aged 18-64 years.

If it is assumed that the percentages of smokers in the various age and sex groups are not changing, then the number of cigarette smokers is increasing only about eight-tenths of 1 percent a year, even though total population 15 years and over is increasing about 1.2 percent a year. It seems likely that the percentage of cigarette smokers in various age and sex groups does change some from year to year, but the extent is not disclosed by data at hand.

Table 3.--Tobacco products: Consumption per capita, 15 years and over, in United States and by overseas forces, 1925-56

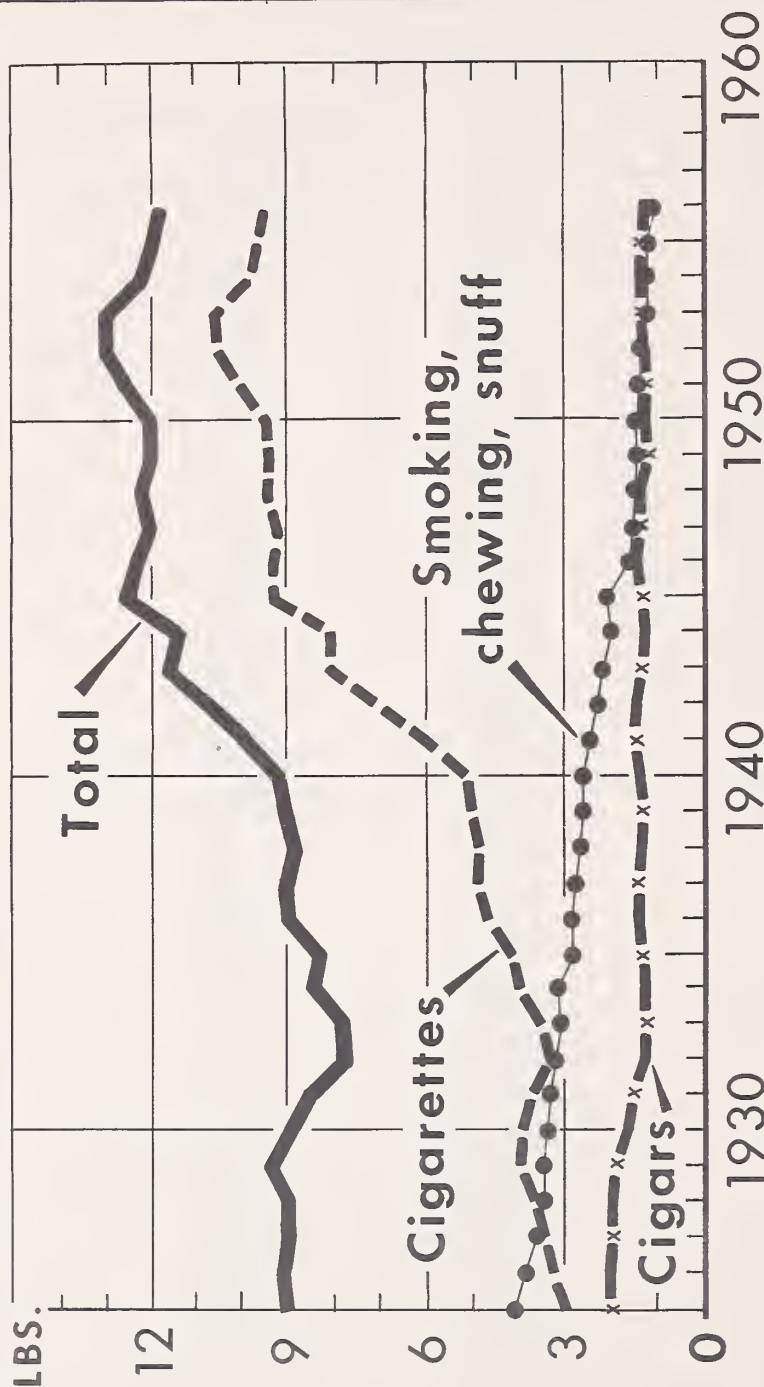
(Unstemmed weight)				
Year	Cigarettes	Cigars	Smoking, chewing, and snuff	Total tobacco products
	Pounds	Pounds	Pounds	Pounds
1925	2.96	1.99	4.03	8.98
1926	3.17	1.99	3.87	9.03
1927	3.42	1.93	3.61	8.96
1928	3.58	1.91	3.44	8.93
1929	3.91	1.86	3.44	9.21
1930	3.84	1.67	3.34	8.85
1931	3.63	1.53	3.29	8.45
1932	3.21	1.24	3.19	7.64
1933	3.49	1.23	3.07	7.79
1934	3.94	1.29	3.11	8.34
1935	4.11	1.30	2.80	8.21
1936	4.61	1.40	2.81	8.82
1937	4.81	1.40	2.74	8.95
1938	4.76	1.31	2.68	8.75
1939	4.95	1.32	2.56	8.83
1940	5.16	1.36	2.60	9.12
1941	5.95	1.42	2.41	9.78
1942	7.01	1.41	2.27	10.69
1943	7.99	1.28	2.19	11.46
1944	8.04	1.22	1.96	11.22
1945	9.15	1.26	2.05	12.46
1946	9.24	1.37	1.59	12.20
1947	9.16	1.29	1.50	11.95
1948	9.35	1.31	1.46	12.12
1949	9.33	1.16	1.44	11.93
1950	9.36	1.18	1.42	11.96
1951	9.98	1.19	1.31	12.48
1952	10.41	1.26	1.25	12.92
1953	10.46	1.26	1.18	12.90
1954	9.73	1.22	1.16	12.11
1955	9.56	1.22	1.12	11.90
1956 ^{1/}	9.44	1.24	1.05	11.73

^{1/} Preliminary estimate.

Note: Data are not available to adjust for quantities that were lost, destroyed, bartered, etc., under war and postwar conditions, but in relation to totals, such adjustments probably would be small.

TOBACCO CONSUMPTION

Per Capita, 15 Years Old and Over



UNSTEMMED PROCESSING-WEIGHT EQUIVALENT CONSUMED IN UNITED STATES AND BY OVERSEAS FORCES

U. S. DEPARTMENT OF AGRICULTURE

NEG. 1122A-56 (9) AGRICULTURAL MARKETING SERVICE

The 1956 tobacco consumption per person, 15 years and over (in the United States and by overseas forces), is estimated at 11-3/4 pounds--slightly lower than in 1955 and the lowest for the postwar period. The 1956 cigarette consumption is estimated at a little under 9-1/2 pounds per person--the lowest since 1950. Although the number of cigarettes consumed has risen in the last 2 years, the equivalent unstemmed poundage figure has declined since more

cigarettes are being made from a pound of tobacco.

The 1956 cigar consumption at near 1-1/4 pounds per person was slightly above the previous 2 years. The 1956 consumption of smoking and chewing tobacco, and snuff combined is estimated at only slightly over 1 pound per person. Consumption of both smoking and chewing tobacco is the smallest on record.

Table 4.--Index numbers of tobacco consumption per capita, 15 years and over,
by products, 1925-56 1/

(1947-49=100)

Year	Cigarettes <u>2/</u>	Cigars <u>2/</u>	Smoking <u>3/</u>	Chewing <u>3/</u>	Snuff <u>3/</u>	Total <u>2/</u>
1925	32	159	217	302	127	75
1926	34	159	210	295	126	75
1927	37	154	198	275	131	75
1928	39	152	189	262	130	74
1929	42	149	187	250	126	77
1930	41	133	193	223	124	74
1931	39	122	212	194	121	70
1932	35	99	220	156	110	64
1933	38	98	218	146	108	65
1934	42	103	215	145	109	69
1935	44	104	212	143	105	68
1936	50	112	211	142	109	73
1937	52	112	202	140	105	75
1938	51	104	212	128	104	73
1939	53	105	212	121	105	74
1940	56	108	211	118	103	76
1941	64	113	199	121	106	81
1942	76	112	173	129	109	89
1943	86	102	155	131	113	95
1944	87	97	141	139	109	93
1945	99	101	165	128	112	104
1946	100	109	102	121	101	102
1947	99	103	99	105	99	100
1948	101	104	101	101	101	101
1949	101	93	100	94	100	99
1950	101	94	98	91	97	100
1951	108	95	91	89	94	104
1952	112	101	86	87	92	108
1953	113	101	78	85	91	108
1954	105	98	74	81	90	101
1955	103	98	69	78	90	99
1956 <u>4/</u>	102	99	63	75	86	98

1/ Including overseas forces beginning 1940.2/ Based on unstemmed-weight equivalents.3/ Based on manufactured weights.4/ Preliminary estimate.

Cigars

Cigar consumption in the United States and by overseas forces in 1956 is expected to be at least 6.3 billion--3 or 4 percent above 1955 and the highest since the late 1920's when it averaged near 7 billion. With a continuation of high economic activity and favorable levels of income, further gains in cigar consumption seem likely in the year ahead.

A sizable part of the increased cigar consumption is due to the increased sales of cigarillos, which are notably smaller and require less tobacco per unit of output than the traditional average size cigar. Most cigarillos retail at 5 cents or less while many leading brands of more traditional sizes sell at 10 cents and some at 6 cents apiece.

The use of "manufactured binder sheet" in place of natural leaf binders is expanding. This cuts manufacturing costs. Fewer operators per machine are required and tobacco materials not previously used for binders such as stems, scrap, and broken pieces can be used in making the "manufactured binder sheet."

According to the Bureau of Labor Statistics indexes, manufacturers' prices for all categories of cigars ("low priced," "popular priced," "medium priced," and "high priced") have changed only slightly during the past few years.

During the first 7 months of 1956, the number of cigars from domestic factories retailing at 4.1 to 8.0 cents ($49\frac{1}{2}$ percent of the total) increased $5\frac{1}{2}$ percent above those for the same months of a year earlier. The number in the 8.1 to 15-cent bracket ($42\frac{1}{2}$ percent of the total) increased 8 percent above a year earlier. About 4 percent of the cigars made in domestic factories sell at 4 cents or less and another 4 percent sell at higher than 15 cents apiece. There was little change in the number of low-priced cigars but consumption of the high-priced cigars increased 13 percent from January-July 1955 to January-July 1956.

In addition to cigars made in domestic factories, cigars are made in bonded manufacturing warehouses exclusively from imported tobacco. These amount to only about 3 to 4 percent of total consumption but have shown a substantial relative increase since the war. About two-thirds of these cigars sell at over 15 cents apiece.

The number of cigars being manufactured in Puerto Rico for the United States market continues to increase and may approximate 100 million this year. This would be the most since 1931. Nearly all of the cigars now coming from Puerto Rico retail in the 8.1-15-cent bracket.

Imports of readymade cigars into this country are now comparatively small in contrast to the fairly substantial quantity that came in before World War II. In recent years, the great majority of imported cigars have come from Cuba and the bulk of them sell at over 20 cents apiece. In pre-World War II years, the imported cigars were nearly all from the Philippines and sold at 5 cents or less.

Table 5.--Cigars 1/: Output and domestic consumption for specified periods

Period	Domestic factories		Bonded manufac- turing ware- houses	Imports for consump- tion	From Puerto Rico: Tax- paid with- drawals		Total tax-paid consump- tion
	Total output	Tax-paid remov- als	Tax-free remov- als	Tax-paid remov- als	Total 2/	From Cuba	in United States
	Mil.	Mil.	Mil.	Mil.	Mil.	Mil.	Mil.
Average:							
1925-29	6,474	6,454	21	28	218.0	28.0	6,866
1935-39	5,075	5,060	13	66	192.4	3.0	5,346
1940-44	5,450	5,282	199	105	93.7	15.3	5,492
1945	5,275	4,774	469	82	60.0	59.8	5,001
1946	5,618	5,621	26	125	22.2	20.1	5,846
1947	5,488	5,460	41	124	12.5	9.1	5,603
1948	5,645	5,588	38	140	11.8	10.3	5,745
1949	5,453	5,399	46	142	10.9	10.2	5,556
1950	5,399	5,365	47	160	11.9	11.1	5,538
1951	5,594	5,518	85	177	14.3	13.0	5,710
1952	5,825	5,755	102	196	14.6	12.5	5,968
1953	5,915	5,820	90	205	16.8	13.4	6,052
1954	5,820	5,690	89	206	16.3	12.3	5,962
1955 <u>3/</u>	5,764	5,832	82	215	20.3	14.7	4/6,050
1956 <u>5/</u>	6,060	6,000	70	220	21.0	15.0	4/6,270
Fiscal year							
Year be- ginning July							
1951	5,685	5,619	87	193	14.4	13.0	5,827
1952	5,911	5,789	94	203	15.6	12.6	6,011
1953	5,849	5,736	101	199	16.2	12.6	5,981
1954	5,787	5,718	82	222	18.2	14.3	6,025
1955	5,806	6,030	74	225	20.9	14.9	4/6,200

1/ Weighing over 3 pounds per 1,000 and including cigarillos. 2/ Predominant share of cigar imports prior to World War II came from the Philippine Islands. 3/ Subject to revision. 4/ Adjusted for presumed duplication of reprocessed cigars which may have been counted twice in the factory removals. 5/ Preliminary estimate

Basic data but not estimates compiled from reports of the Internal Revenue Service and the Bureau of the Census.

Table 6.--Consumption of cigars, smoking and chewing tobacco per male, 15 years and over, in the United States and by overseas forces, 1925-56

Year	Cigars 1/ Number	Cigars 2/ Pounds	Smoking tobacco 3/ Pounds	Chewing tobacco 3/ Pounds
1925	170.4	3.88	4.12	5.05
1926	167.6	3.89	3.99	4.94
1927	163.2	3.77	3.77	4.61
1928	158.9	3.73	3.59	4.40
1929	157.7	3.64	3.56	4.20
1930	141.6	3.28	3.69	3.75
1931	127.2	3.00	4.03	3.26
1932	103.7	2.44	4.21	2.63
1933	100.7	2.42	4.17	2.47
1934	105.3	2.53	4.12	2.45
1935	107.1	2.57	4.07	2.43
1936	114.1	2.77	4.07	2.41
1937	115.1	2.78	3.89	2.38
1938	110.8	2.60	4.09	2.18
1939	111.8	2.62	4.09	2.07
1940	112.5	2.70	4.08	2.01
1941	117.7	2.83	3.86	2.06
1942	117.5	2.81	3.35	2.21
1943	105.1	2.56	2.99	2.23
1944	98.5	2.43	2.72	2.37
1945	104.9	2.53	3.19	2.20
1946	112.9	2.75	1.99	2.07
1947	105.4	2.60	1.93	1.81
1948	107.0	2.63	1.97	1.74
1949	102.8	2.35	1.95	1.61
1950	101.5	2.38	1.91	1.57
1951	104.1	2.40	1.78	1.53
1952	108.3	2.55	1.69	1.50
1953	108.9	2.56	1.52	1.47
1954	106.3	2.49	1.45	1.41
1955	106.3	2.49	1.37	1.36
1956 <u>4/</u>	109.5	2.52	1.24	1.31

1/ Weighing 3 pounds and over per 1,000 and includes cigarillos.

2/ Unstemmed-processing weight.

3/ Manufactured weight.

4/ Preliminary estimate.

Comparatively few cigars are exported from the United States--less than 6 million in 1955. During the first third of 1956, cigar exports totaled $2\frac{1}{2}$ million--about two-fifths more than in the same months of 1955.

Smoking Tobacco

Output of smoking tobacco in 1956 seems likely to be around 73 million pounds--about 9 percent lower than in 1955 and a new low. Smoking tobacco is used for pipe smoking and "roll-your-own cigarettes." During the 1930's, the annual volume of smoking tobacco sold was around $2\frac{1}{2}$ times as much as in the last 2 or 3 years. In the main, these are the most economical forms of smoking. With incomes of most consumers remaining high, the other forms of smoking are likely to be preferred. It appears that smoking tobacco output will continue at the low levels of the last year or two or even decline some further. During the first half of 1956, withdrawals of tax-paid cigarette papers were 28 percent lower than in the first half of 1955. Although current data on cigarette papers given away and not subject to tax are unavailable, the drop in the tax-paid group is one indication that "roll-your-own cigarettes" have probably been declining fairly sharply.

Manufacturers' prices of smoking tobacco have risen only about 3 percent since 1952. Retail prices for smoking tobacco sold in rural areas show about the same percentage increase between 1952 and mid-1956.

Exports of packaged smoking tobacco are relatively small in relation to total output--about one-half million pounds in calendar 1955.

Much of the manufactured tobacco listed under the export category of bulk smoking tobacco is not included in the output figure reported by the Internal Revenue Service. Exports of bulk smoking tobacco have increased substantially in recent years--from around $1\frac{1}{2}$ million pounds in both 1949 and 1950 to nearly $6\frac{1}{4}$ million in 1955. During the first 7 months of 1956, exports of bulk smoking tobacco were running 4 percent above the same period of 1955. This export category includes especially prepared cigarette tobacco, cut or granulated tobacco, partially processed-blended tobacco, and shredded tobacco. Major destinations for the bulk smoking exports during the first half of 1956 were Spain, Philippine Republic, Mexico, Haiti, Panama, Dominican Republic, Ecuador, Bolivia, Indochina, and Australia.

Chewing Tobacco

The 1956 output of chewing tobacco is estimated at about 77 million pounds--over 2 million below 1955 and the smallest this century. The downward trend in chewing tobacco consumption has been apparent for many years and some further decline seems likely in the year ahead.

Scrap and plug chewing account for about 47 and 44 percent of total chewing tobacco output and twist and fine-cut, for the other 9 percent. In the past 5 years, the average yearly decline in the output of scrap has been

Table 7.- Output of smoking and chewing tobacco and snuff
in the United States for specified periods

Period	Smoking	Chewing					Snuff
		Plug	Twist	Fine-cut	Scrap	Total	
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.
Average:							
1925-29	161.1	104.5	8.8	6.2	77.4	196.9	39.6
1935-39	195.3	56.8	6.0	4.8	43.8	111.4	37.3
1940-44	176.2	54.8	6.0	4.6	47.9	113.3	40.7
1945	168.5	59.7	6.7	4.0	47.7	118.1	43.8
1946	106.4	51.8	5.8	3.8	46.1	107.5	39.4
1947	104.7	47.3	5.2	3.8	42.2	98.5	39.2
1948	107.6	45.3	5.6	3.2	42.1	96.2	40.8
1949	108.1	41.9	5.6	2.8	39.6	89.9	40.9
1950	107.7	40.3	5.5	2.7	39.0	87.5	40.0
1951	101.3	39.9	4.6	2.8	39.1	86.4	39.5
1952	96.8	39.1	4.8	2.8	38.2	84.9	38.8
1953	86.6	38.1	4.7	2.9	38.1	83.8	39.1
1954	83.7	37.0	4.9	2.9	36.6	81.4	38.5
1955	79.8	35.5	4.4	3.0	36.2	79.1	39.2
1956 <u>1/</u>	73.0	33.2	4.3	3.0	36.2	76.7	38.5
Fiscal year							
Year beginning July							
1951	98.0	39.4	4.5	2.8	39.0	85.7	39.1
1952	92.3	38.5	4.9	2.8	37.5	83.7	38.1
1953	83.1	37.6	4.7	2.9	37.5	82.7	39.0
1954	84.8	36.7	4.9	3.0	36.5	81.1	38.8
1955	74.0	34.0	4.3	2.9	36.1	77.3	38.4

1/ Preliminary estimate.

Basic data but not the estimates compiled from reports of the Internal Revenue Service.

$1\frac{1}{2}$ percent, while the rate of decline for plug chewing has been $2\frac{1}{2}$ percent. Output of twist in the last 2 years appears to have resumed a declining trend while output of fine-cut chewing has held fairly stable.

Manufacturers' prices of plug chewing tobacco have changed only once in the last few years--a slight decrease about a year ago.

All except about 2 percent of the chewing tobacco output is consumed tax-paid in this country. In the last 5 years, exports have ranged from 1.4 (1951) to 2.1 (1954) million pounds. In 1955 exports of chewing tobacco--mostly plug and twist--totaled 1.6 million pounds, a large part of which went to Australia and the Philippine Republic. Indications are that total exports of chewing tobacco during the first half of 1956 exceeded those for the same period of 1955.

Snuff

The 1956 output of snuff is expected to be near 38 1/2 million pounds--about 2 percent less than in 1955 but close to the 1954 figure. Nearly all the snuff produced is consumed in this country--mainly in the southern and northwestern United States. Although declining on a per capita basis, snuff consumption in the aggregate tends to remain stable. About a 38 or 39 million pound output again seems likely in 1957.

Manufacturers' prices for snuff advanced about 2 percent in August 1955 and then remained constant through July 1956.

EXPORTS OF UNMANUFACTURED TOBACCO FROM THE UNITED STATES 1/

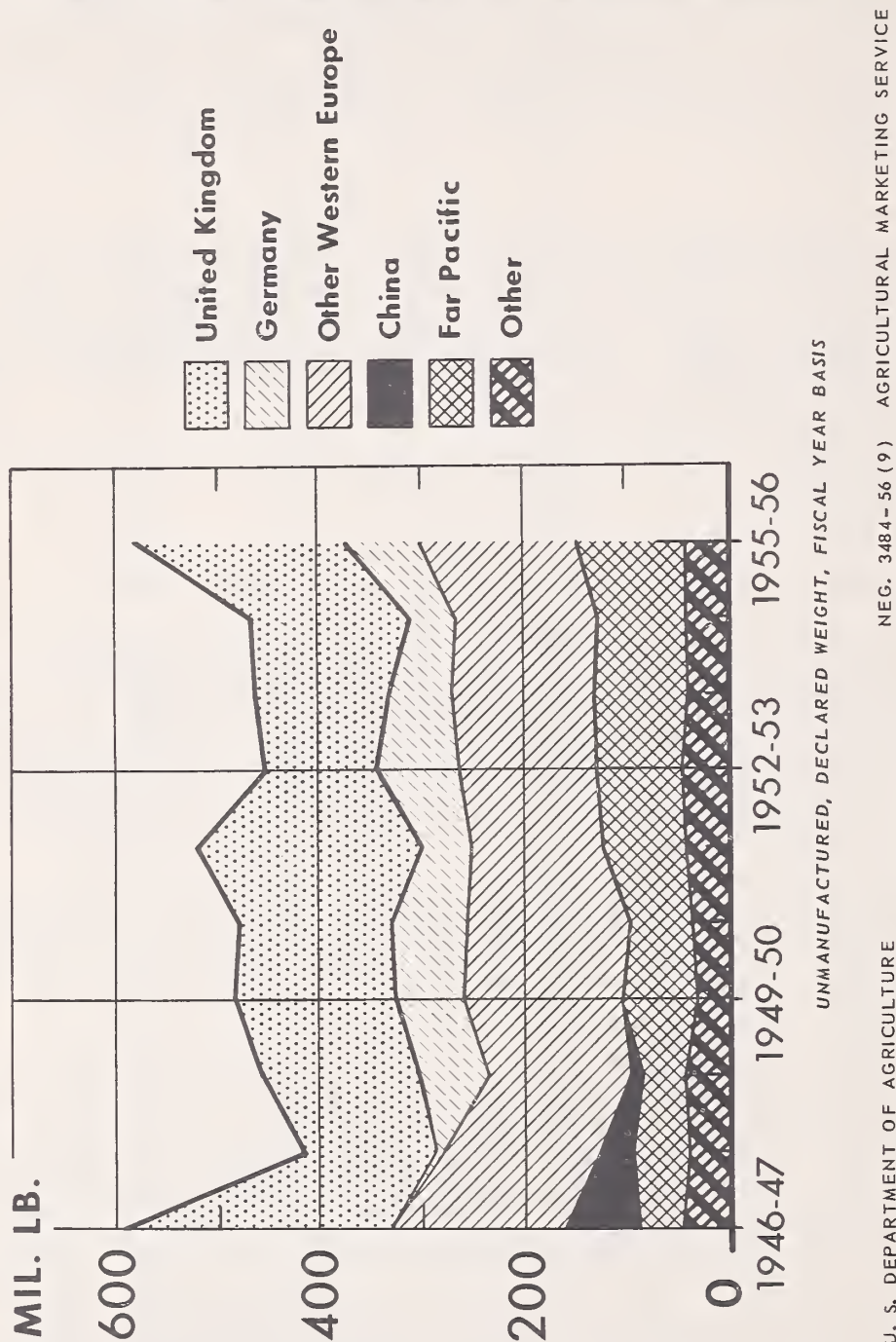
Exports of unmanufactured tobacco in calendar 1956 are expected to total around 510 million pounds (declared weight)--about 6 percent lower than the comparatively high 1955 figure but 8 percent above the 1950-54 average. British takings will be down this year since a sizable share of the past year's exports to that country was to build up stocks. Also shipments to the Philippines this year will be only a small fraction of the substantial quantity that went there in 1955.

During the first 8 months of 1956, total exports of tobacco were approximately equal to those in the same period of 1955. However, heavy shipments usually occur in the last 4 months of the year, and total shipments for September-December of this year will be down from the very high level for September-December 1955.

Public Law 480 programs, which enable sales of tobacco for foreign currencies instead of dollars, have contributed to the high level of tobacco exports this year and last. These sales are subject to the condition that they be in excess of usual takings. In calendar year 1955, about 42 million pounds were shipped under Public Law 480 programs and during the first half of 1956, about 35 million pounds were shipped under these programs. Additional tobacco will be shipped under these programs in the months ahead. Countries having agreements which include significant amounts of tobacco not shipped by mid-1956 are Indonesia, Finland, India, Spain, Formosa, Pakistan, Korea, Burma, Japan, and Italy. In early August, legislation was approved for raising the authorized maximum from 1.5 to 3.0 billion dollars for operations under Title I of Public Law 480 under which sales of surplus agricultural

1/ Quantities of tobacco in this section are stated in terms of export weight, which is less than the equivalent farm-sales weight.

EXPORT MARKETS FOR U. S. TOBACCO



Exports of unmanufactured tobacco in 1955-56, at 578 million pounds (equivalent to 646 million, farm-sales weight), were one-fourth greater than in 1954-55 and only a little below the postwar peak of 1946-47. Public Law 480 programs--under which foreign currencies are accepted in lieu of dollars--contributed to the high 1955-56 level. The most substantial single increase from 1954-55

to 1955-56 was to the United Kingdom. Also Germany took considerably more than the relatively low quantity of a year earlier. Other countries getting significantly more in 1955-56 than in 1954-55 were Belgium, Denmark, Switzerland, Austria, Spain, Italy, Finland, Australia, Indonesia, Thailand, Indochina, Korea, and Japan.

Table 8.--United States exports of unmanufactured tobacco by types and to principal importing countries for specified periods
(Declared weight)

Country and type	Calendar year			Year beginning July		January-July		
	Average	Average	Average	1954	1955	1955	1956	1956 as
	1924-28	1934-38	1949-53	1/	1/	1/	1/	percent- age of 1955
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Percent
Flue-cured	2/324.0	324.9	392.2	380.2	491.5	164.6	172.6	105
Burley	8.9	11.6	30.0	28.5	29.8	18.3	16.4	90
Maryland	14.3	5.5	7.3	8.1	11.6	3.8	6.9	182
Va. fire-cured and sun-cured	22.6	9.7	4.8	3.8	5.3	1.7	2.6	153
Ky. and Tenn. fire-cured	2/126.6	53.7	24.6	22.1	23.1	12.7	14.6	115
Green River	15.8	3.0	2.1	3.0	.7	1.7	.8	47
Black Fat, etc.	2/2.0	9.0	4.1	5.2	4.8	3.2	2.5	78
Cigar wrapper	)	)	3.4	3.7	4.5	2.1	2.4	114
Cigar binder	) .8	1.3	4.2	1.5	)	.6)	
Cigar filler	)	)	2.7	3/	)	3/)	
One Sucker	3/	.7	2.9	2.2	)	1.7)	
Perique	2/7.1	.1	.1	.1	)6.4	.1	)3.7	88
Stems, trimmings, and scrap	12.0	17.8	4.2	3.1	)	1.8)	
Total	527.1	437.3	482.6	461.5	577.7	212.3	222.5	105
Country of destination:								
United Kingdom	164.8	213.9	151.7	152.5	203.4	43.1	39.3	91
France	34.6	21.0	9.1	15.2	6.5	5.4	4.1	76
Belgium	21.1	15.5	21.0	18.6	24.2	12.3	12.0	98
Netherlands	31.5	15.6	32.7	33.1	34.3	13.7	16.2	118
Germany, W. & E.	34.0	12.8	73.6	47.2	73.3	38.0	46.8	123
Portugal	4.4	4.8	7.3	8.1	6.7	5.7	6.8	119
Denmark	5.2	4.6	11.3	10.6	12.7	4.6	5.4	117
Ireland	3.8	7.4	18.9	14.2	11.7	3.2	3.5	109
Switzerland	2.8	3.8	12.0	10.5	14.0	4.4	7.8	177
Norway	4.1	4.7	7.4	7.7	8.5	3.7	4.5	122
Sweden	4.7	7.2	11.5	11.4	11.2	2.4	3.0	125
Italy	7.8	1.1	3.2	.8	5.5	3.2	3.2	100
Hong Kong	.9	1.6	4.7	4.1	3.6	2.6	2.1	81
Australia	21.5	18.4	21.7	28.5	30.7	5.4	3.7	69
India-Pakistan	5.4	2.6	5.5	6.0	3.0	4.1	2.1	51
New Zealand	.6	2.5	6.2	7.1	6.7	5.6	4.5	80
Philippine Rep.	.5	1.2	17.6	17.2	13.7	11.1	2.2	20
Indonesia	5.8	2.0	8.3	6.7	10.6	4.1	6.7	163
Japan	1.1	7.3	3.8	6.7	12.7	4.7	3/	---
Other countries	4/172.5	4/89.3	55.1	55.3	84.7	35.0	48.6	139
Total	527.1	437.3	482.6	461.5	577.7	212.3	222.5	105

1/ Preliminary. 2/ Partially estimated. 3/ Less than 50,000 pounds. 4/ China averaged 93 million pounds in 1924-28 and 48 million in 1934-38.

Compiled from publications and records of the Bureau of the Census.

commodities are made for foreign currencies. Some additional agreements that include tobacco are expected to be signed before the end of the current fiscal year.

Exports of tobacco to many foreign destinations have been favored by the high level of economic activity abroad--particularly in Western European countries. Many foreign countries have improved their gold and dollar holdings. Record high purchases of goods and services by this country from abroad have been a major factor in this improvement. During the first 7 months of 1956, total value of general imports into the United States were nearly 16 percent greater than the already high level in the comparable months of 1955. At the end of March 1956, gold reserves and dollar holdings of countries of continental Western Europe were about 14 percent above a year earlier with such important tobacco importing countries as Germany, Netherlands, Belgium, and Switzerland all showing significant increases. Reserves also increased in Japan, Indonesia, and Australia. Gold and dollar holdings of the sterling area held in London after declining 23 percent during 1955, were rising during the first 7 months of 1956. However, they declined fairly sharply during August and at the end of the month, were 7 percent lower than a year earlier and 22 percent below 2 years earlier.

On a marketing year basis, the 1956-57 tobacco exports seem likely to be around 10 percent less than the estimated 570 million pounds (roughly 640 million farm-sales weight) for 1955-56. The 1955-56 level was the highest since 1946-47. The main declines will be due to the smaller takings by the United Kingdom and a sharp drop in that going to the Philippine Republic, as is the case from calendar 1955 to 1956. Also there may be some less than the record 1955-56 amount going to Australia and less to Japan.

General economic factors seem likely to continue to favor tobacco exports to a number of countries. Consumption of tobacco in many countries is increasing fairly steadily. An influence that is not favorable to tobacco exports is that the traditionally medium-priced grades of tobacco sought by some countries have tended to advance quite sharply in the last year or two because of increased demand in this country. Larger quantities of the heavier --bodied, more aromatic tobaccos apparently are being used in the manufacture of cigarettes in this country. Other influences that are not favorable to tobacco exports include various restrictions and high import duties that continue to hamper imports of United States tobacco in many countries. Also, the continued expansion of tobacco production in foreign producing areas is the increasing the competition faced by United States tobacco seeking foreign outlets.

Foreign Producing and Exporting Countries

Flue-cured tobacco production in principal foreign countries with exportable surpluses is considerably larger this year but outturn of oriental tobacco will be smaller. Combined flue-cured production of the four principal surplus producers in 1956 exceeds their 1955 production by 103 million pounds (24 percent), with most of the increase occurring in Canada and Southern Rhodesia.

Table 9.- Production of flue-cured and oriental tobacco in specified countries for specified periods

Country	Year of harvest					
	Average:	Average:	1953	1954	1955	1956
	:1935-39:	:1948-52:	:	:	:	1/
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.
Flue-cured						
Brazil	12.5	39.9	58.7	56.2	55.1	66.1
Canada	54.6	120.7	132.4	173.2	118.2	170.0
India	26.9	87.0	119.0	130.0	119.0	125.0
Central African Federation	28.4	101.0	120.0	133.2	131.9	166.3
Total countries shown	122.4	348.6	430.1	492.6	424.2	527.4
Oriental						
Greece	132.8	110.1	135.0	148.8	222.9	185.0
Turkey	128.1	189.2	257.6	211.6	247.5	244.5
Total countries shown	260.9	299.3	392.6	360.4	470.4	429.5

1/ Preliminary.

Compiled from reports of Foreign Agricultural Service and Tobacco Intelligence, Commonwealth Economic Committee, London, England.

In Canada, acreage allotments to members of the Ontario Flue-cured Tobacco Growers' Association, which were sharply reduced in 1955, were raised in 1956. The big increase in total acreage is expected to result in a production of 170 million pounds, 44 percent higher than in 1955, and only slightly below the peak output in 1954. Exports of Canadian flue-cured in 1955, mostly from the 1954 crop, amounted to 45½ million pounds, up 47 percent from the preceding year. Most of the shipments went to the United Kingdom and Commonwealth destinations; small quantities went to Western Germany, Netherlands, and Belgium. The average price received by Canadian growers for the 1955 flue-cured crop was 45.3 cents a pound, about 2 cents higher than in 1954.

Southern Rhodesia, the principal flue-cured producer in the Central African Federation (which also includes Northern Rhodesia and Nyasaland), harvested a record crop of about 153 million pounds in early 1956. This was over one-fourth more than in the previous year. In the first 22 weeks of auctions (through August 9), 104 million pounds of Southern and Northwestern Rhodesian tobacco were marketed, about two-thirds of the crop. The average price received was equivalent to 39.8 United States cents per pound, 19 percent less than in the comparable period of a year earlier. Exports of unmanufactured tobacco from the Federation--mostly flue-cured--amounted to 24 million pounds in the first 5 months of 1956, 28 percent less than a year

earlier. The decline was largely because of reduced auction sales early in the season, when marketings were suspended following grower dissatisfaction with prices for middle quality grades. Most of the decline in exports were to the United Kingdom, the principal market for Federation tobacco. The Netherlands, Western Germany, Belgium, Denmark, Egypt, Indonesia, and Union of South Africa received more than in the same months of 1955.

India's 1955 flue-cured crop is estimated at 125 million pounds, 5 percent more than in 1954. During April 1955-March 1956, India exported 90 million pounds of unmanufactured tobacco, 22 percent more than a year earlier. The United Kingdom was the single most important market but, along with other Commonwealth areas, took less Indian tobacco in 1955-56. Shipments to China, Indonesia, and Japan, however, were substantially higher than in the preceding year. Increasing attention is being given by the Indian Government to means of improving the quality of Indian tobacco entering export markets.

Brazil's 1956 flue-cured crop of 66 million pounds is one-fifth higher than in the previous year. Major markets for Brazilian unmanufactured tobacco in 1955 included Western Germany, Spain, France, Netherlands, Denmark, and Switzerland.

The 1956 production of oriental tobacco in Turkey is placed at 244 million pounds, slightly below the previous year. Export markets for Turkey's tobacco in the first 6 months of 1956 included the United States, West Germany, United Kingdom, Italy, Austria, Finland, Belgium, and the "Iron Curtain" countries of East Germany, Poland, Czechoslovakia, and Hungary. In Greece, the 1956 oriental tobacco crop is estimated at 185 million pounds, 17 percent below the record harvest in 1955. The five ranking outlets for Greek tobacco in January-June 1956 were West Germany, United States, Austria, Finland, and Soviet Union, which together accounted for three-fourths of the total 30 million pounds shipped.

While not a surplus producer of any importance, Japan's tobacco production is of interest as that country has been a United States market for high-quality flue-cured tobacco in recent years. Of the 23 million pounds of unmanufactured tobacco imported into Japan in 1955, 57 percent was purchased from the United States. Tobacco production in Japan had expanded rapidly in the postwar period and at 329 million pounds in 1955 was almost double the 1937-41 average. The increase was mainly in flue-cured. In 1955 the Japanese flue-cured crop amounted to 209 million pounds--a jump of 82 million pounds or 65 percent since 1953.

British Tobacco Situation

For many years the United Kingdom has been the leading export outlet for United States tobacco. Smoking is probably more widespread in Britain than in the United States. However, less tobacco is consumed per person 15 years and over than in the United States. It has been estimated that 1955 consumption of tobacco (unstemmed equivalent) in Britain was 7.7 pounds per capita 15 years and over--about 23 percent above the 1935-39 average. For the

Table 10.--United Kingdom tobacco: Imports, stocks, clearances, and exports for specified periods

Period	Imports <u>1/</u>			Stocks Dec. 31	Gross clearances from bond <u>3/</u>			Re-exports of unmanu- factured tobacco	
	From U. S. <u>2/</u>	From Common- wealth coun- tries <u>2/</u>	Total		Non- prefer- ential <u>2/</u>	Prefer- ential <u>2/</u>	Total		
									Mil. <u>lb.</u>
Average									
1934-38	213	57	275	497	185	47	232	39	12
1939-45	182	63	255	310	215	62	277	27	5
1946	366	62	433	383	261	61	322	55	7
1947	201	82	296	384	235	57	292	52	1
1948	172	97	281	390	204	67	271	45	1
1949	154	119	302	419	190	81	271	47	2
1950	144	146	306	445	180	91	271	43	4
1951	212	131	355	498	183	104	287	51	7
1952	67	143	224	430	172	108	280	47	12
1953	174	127	316	452	167	116	283	45	9
1954	160	139	312	468	168	122	290	41	4
1955 <u>4/</u>	179	150	344	506	173	125	298	44	4
Jan.- July									
1953	75	57	140	5/399	6/84	6/57	6/141	27	7
1954	29	64	102	5/388	6/82	6/61	6/143	25	3
1955	40	84	134	5/417	6/84	6/60	6/144	26	2
1956 <u>4/</u>	48	59	115	5/455	6/86	6/63	6/149	25	1

1/ Unmanufactured tobacco. 2/ Since 1946 the full duty rate on tobacco from the United States and other nonpreferential areas has been about 3 percent above the preferential rate on tobacco from Commonwealth areas. In the prewar period, the full duty rate was over 25 percent above the preferential rate.

3/ Largely withdrawals for manufactures for home use and export. 4/ Subject to revision. 5/ June 30. 6/ January-June.

Compiled from the Annual Statement of Trade and Accounts Relating to Trade and Navigation of the United Kingdom.

United States, 1955 consumption at 11.9 pounds per capita 15 years and over was about 37 percent above the 1935-39 average. Cigarette smoking is the predominant form of tobacco use in the United Kingdom followed by pipe smoking. Cigars, chewing tobacco, and snuff comprise an almost negligible proportion of total consumption.

British import duties on tobacco are exceedingly high--equivalent to about \$8.55 per pound on leaf from non-Commonwealth sources such as the United States and to about \$8.34 per pound on leaf from Commonwealth sources such as Rhodesia, India, and Canada. These high duties are, of course, reflected in the prices of cigarettes which now average the equivalent of around 53 $\frac{1}{2}$ cents per pack of 20.

The United Kingdom imports leaf tobacco not only for home consumption needs but also for subsequent export--mostly in the form of manufactured cigarettes. The volume of cigarette exports is fairly substantial and has exceeded those from the United States in the last several years.

Gross clearances of tobacco from bond in the United Kingdom are an approximate measure of home use and exports combined. The 1955 tobacco gross clearances at 298 million pounds were nearly 3 percent above 1954 and in the first half of 1956, rose another 3 percent above the comparable period of 1955. British home consumption of tobacco during the first half of 1956 was greater than in the first half of 1955 but exports were down a little. Leading destinations for British made cigarettes were Singapore, Malaya, Western Germany, Belgian Congo, Gold Coast, Hong Kong, Aden, and New Zealand. Cigarettes shipped to Australia, usually a leading outlet, dropped sharply below usual amounts for the half-year period and this largely accounted for the decline in total cigarette exports.

Gross clearances of flue-cured tobacco originating from the 4 major suppliers at about 263 million pounds accounted for close to nine-tenths of the British total last year. About 55 percent of this flue-cured came from the United States, 22 percent from Rhodesia, 13 percent from India, and 10 percent from Canada. During January-May 1956 compared with the same period of 1955, gross clearances of United States flue-cured increased 4.0 percent; of Rhodesian flue-cured, 8.7 percent; Indian flue-cured, 8.2 percent; and, Canadian flue-cured, 6.7 percent. Gross clearances of Nyasaland dark fire-cured and air- and sun-cured tobacco, were 8.5 percent lower than a year earlier. The January-May 1955 gross clearances of Indian air- and sun-cured declined a little compared with a year earlier but clearances of Turkish tobacco increased slightly.

Imports of unmanufactured tobacco in the year ended June 30, 1956, totaled 345 million pounds--almost 6 percent above 1954-55 and the most since 1951-52. Imports from the United States increased 37 percent, mostly because of acquisition of additional tobacco under the United States Public Law 480 program. For relative changes in tobacco imports from the major suppliers to Britain and the proportionate shares from each one, see table 11 based on official data from British publications.

Table 11.--Unmanufactured tobacco imports into the United Kingdom from major sources, average 1934-38, annual 1947-55

Year be- ginning July 1	United States	Rhodesia and Nyasaland	India	Canada	Turkey	Greece	Other	Total
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.
Average 1934-38	210.6	28.4	18.1	12.3	0.6	0.6	4.5	275.1
1947	130.7	46.0	21.8	13.1	1.2	.1	2.6	215.5
1948	147.5	56.3	32.5	13.0	25.4	5.6	3.9	284.2
1949	162.1	64.9	46.6	15.0	13.7	1.3	5.5	309.4
1950	146.7	82.6	42.1	20.2	1.9	1.0	6.9	301.4
1951	223.1	62.0	43.8	36.2	1.9	1.2	10.8	379.0
1952	105.0	74.0	32.3	12.4	1.2	.8	14.7	240.4
1953	127.4	69.4	34.0	32.3	2.1	1.0	14.6	280.8
1954	151.9	82.7	36.1	40.2	3.5	1.6	10.9	326.9
1955	208.5	60.8	40.2	21.1	3.3	1.9	9.7	345.5
Percentage change								
	Pct.	Pct.	Pct.	Pct.	Pct.	Pct.	Pct.	Pct.
Average 1934-38 to 1955	-1.0	114.1	122.1	71.5	450.0	216.7	115.6	25.6
1954 to 1955	37.3	-26.5	11.4	-47.5	-5.7	18.8	-11.0	5.7
Percentage distribution								
	Pct.	Pct.	Pct.	Pct.	Pct.	Pct.	Pct.	Pct.
Average 1934-38	76.6	10.3	6.6	4.5	.2	.2	1.6	100.0
1947	60.6	21.3	10.1	6.1	.6	---	1.3	100.0
1948	51.8	19.8	11.4	4.6	8.9	2.0	1.5	100.0
1949	52.5	21.0	15.1	4.9	4.4	.4	1.7	100.0
1950	48.6	27.4	14.0	6.7	.6	.3	2.4	100.0
1951	58.9	16.4	11.5	9.6	.5	.3	2.8	100.0
1952	43.7	30.8	13.4	5.2	.5	.3	6.1	100.0
1953	45.4	24.7	12.1	11.5	.7	.4	5.2	100.0
1954	46.5	25.3	11.0	12.3	1.1	.5	3.3	100.0
1955	60.4	17.6	11.6	6.1	1.0	.5	2.8	100.0

Stocks of tobacco in the United Kingdom at the end of June 1956 totaled 455 million pounds--9 percent above a year earlier. Stocks amounted to about 18 months' use as represented by July 1955--June 1956 gross clearances, while in mid-1955, stocks amounted to 16 1/2 months's use. At the end of May, British stocks of United States flue-cured at 234 million pounds were 32 percent larger than a year earlier. Stocks of Rhodesian, Indian, and Canadian flue-cured amounted to 77, 49, and 43 million pounds, respectively. The stocks of Rhodesian and Canadian flue-cured were 8 and 15 percent lower but stocks of Indian flue-cured were 2 1/2 percent higher than at the end of May 1955. Stocks of Nyasaland dark fire-cured on May 31, 1956, were 18 percent below a year earlier and, of air- and sun-cured from India and Nyasaland, were down 15 and 14 percent, respectively. For oriental tobacco, British stocks of Turkish tobacco were slightly higher but stocks of Greek tobacco were a little lower than a year earlier.

UNITED STATES IMPORTS AND STOCKS OF FOREIGN GROWN TOBACCO 2/

Foreign grown tobacco is imported into this country mainly for blending with domestic types in the manufacture of cigarettes and cigars. Total tobacco imports for consumption in the year ending June 30, 1956, were a record 115 million pounds--5 percent above a year earlier. Three-fourths of it was cigarette leaf and almost all of the rest was for use in cigars. Imported tobacco constitutes about 7 percent of the tobacco used in cigarette manufacture in this country and about 20 to 25 percent of tobacco used in cigar manufacture.

Cigarette leaf imports during the year ended June 30 totaled 85 million pounds--nearly 4 percent above a year earlier and 16 percent above the 1949-53 average. Turkey and Greece were the two main sources--accounting for 70 and 22 percent of total cigarette leaf imports. As of July 1, 1956, stocks of foreign grown cigarette and smoking tobacco in the United States totaled a record 195 1/2 million pounds--13 percent higher than a year earlier and 9 percent above the previous high for July 1 in 1951.

Cuba is the principal source of cigar tobacco imports. In the year ended June 30, imports of stemmed filler and unstemmed filler were about 2 and 29 percent lower than a year earlier while imports of scrap tobacco from Cuba were up about 15 percent. Also, cigar wrapper imported from Cuba increased sharply percentagewise--although it was still a small fraction compared with domestically produced wrapper. The July 1 stocks of Cuban tobacco in this country at 16.3 million pounds were about 3 1/2 percent lower than a year earlier but about 5 percent above 2 years earlier.

Imports of scrap tobacco from the Philippine Republic during the year ended June 30 were up sharply--over 3 times as much as a year earlier. The July 1 stocks of Philippine tobacco in this country totaled 4.2 million pounds

2/ Imports of tobacco for consumption are on a declared-weight basis and stocks are on an unstemmed-equivalent basis.

Table 12.- United States imports for consumption of unmanufactured tobacco, from principal supplying countries, for specified periods

(Declared weight)								
Classification and country of origin	Calendar year			Year beginning July		January-July		
	Average	Average	Average	1954	1955	1955	1956	1956
	1924-28 1/	1934-38	1949-53	2/	2/	2/	2/	as percentage of 1955
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Pct.
Cigarette leaf								
Unstemmed:								
Turkey	13.1	18.2	51.6	57.4	59.8	33.0	24.1	73
Greece	20.1	18.8	12.1	16.6	18.4	10.1	10.5	104
Syria	.2	.5	3.7	2.6	2.0	1.5	1.1	73
Italy	10.8	4.7	.6	2.0	1.5	1.0	1.1	110
Malta	0	.1	.1	.3	.4	.2	.3	150
Yugoslavia	0	0	.6	2.7	2.6	2.1	1.4	67
Total 3/	46.1	44.4	73.4	82.3	85.3	48.1	50.7	105
Cigar leaf (filler)								
Cuba:								
Stemmed	13.8	7.1	10.7	9.3	9.1	5.3	5.5	104
Unstemmed	7.8	4.1	4.1	5.5	3.9	3.6	2.2	61
Philippines, Rep.								
Stemmed	1.7	4/	.6	0	5/	0	5/	---
Unstemmed			.2	0	.5	0	.5	---
Total 3/	22.4	11.3	15.6	14.8	13.5	8.9	8.3	93
Scrap:								
Cuba	1.8	2.9	6.6	9.3	10.7	5.4	6.9	128
Philippines, Rep.	0	4/3.2	.8	1.2	3.9	.7	2.5	357
Total 3/	1.9	6.1	7.5	10.5	14.6	6.1	9.5	156
Cigar wrapper (unst.):								
Indonesia	6/6.1	6/1.9	.7	.4	.2	.2	.1	50
Cuba	.1	.2	.3	.5	.6	.3	.4	133
Total 3/	6.3	2.1	1.0	.9	.8	.5	.5	100
Stems 7/	1.6	2.4	.7	1.3	1.1	.7	.6	86
Total imports	78.3	66.3	98.2	109.8	115.3	64.3	70.1	109

1/ General imports. 2/ Preliminary. 3/ Includes relatively small quantities from other countries not separately listed. 4/ Reported as leaf in 1934-35 and as scrap in 1936-38. 5/ Less than 50,000 pounds. 6/ From Netherlands Indies or Netherlands. 7/ Not cut, ground, or pulverized.

Compiled from publications and records of the Bureau of the Census.

compared with less than 1 million a year earlier and 1 2/3 million 2 years earlier. This is the highest stocks figure for Philippine tobacco since the 6-7 million pound level in 1940 and 1941.

Imports of cigar wrapper from Indonesia declined sharply from 1954-55 to 1955-56 and amounted to less than one-half of the 1949-53 average. Stocks in this country fell from 822,000 pounds on January 1 (the highest for that date since 1951) to 118,000 pounds on July 1 of this year--the lowest level on record.

OUTLOOK AND SITUATION FOR TOBACCO LEAF

Flue-Cured, Types 11-14

Domestic Use and Exports

Domestic use of about 728 million pounds of flue-cured during July 1955-June 1956 was 2 percent lower than in the preceding year. On the other hand, the number of manufactured cigarettes (the predominant domestic outlet for flue-cured) rose about 2 percent. Manufacturers are apparently getting a greater number of cigarettes per pound of leaf than formerly as was discussed on page . While there were some indications of this previously, statistics on marketing year disappearance that became available recently give even more confirmation that this is so.

It seems likely that the number of cigarettes manufactured in 1956-57 will gain some over 1955-56. However, if the present trend towards more cigarettes per pound of tobacco continues, the domestic use of flue-cured in 1956-57 is not likely to show much increase and may be nearly the same as in 1955-56.

The 1955-56 exports of flue-cured at 553 1/2 million pounds (farm-sales weight) were 29 percent larger than in 1954-55 and the largest on record--barely exceeding the 1946-47 level. Shipments under the P. L. 480 programs contributed substantially to the high 1955-56 level. Exports of flue-cured during the 1956-57 marketing year are not expected to be as large as the high 1955-56 level although they probably will be above most other years. P. L. 480 sales will again be a contributing factor.

During 1955-56 the United Kingdom, accounting for about two-fifths of this country's flue-cured exports, took 36 percent more than a year earlier and the most in 4 years. West Germany, ranking second and accounting for 12 percent, raised her takings 54 percent above the comparatively low 1954-55 figure. Flue-cured shipments to Australia, the third ranking outlet, were 11 percent above 1954-55 and the largest on record. Exports of flue-cured to Netherlands and Belgium, ranking fourth and fifth, were 4 and 37 percent larger in 1955-56 than in 1954-55. The next 5 outlets according to volume taken were the Philippine Republic, Ireland, Japan, Indonesia, and Denmark. The 1955-56 shipments to the Philippine Republic fell sharply below each of the preceding 3 years. Ireland got 18 percent less than in 1954-55 and the

Table 13.--Flue-cured tobacco, types 11-14: Domestic supplies, disappearance, season average price, and price support operations for specified periods

(Farm-sales weight)

Year	Production	Stocks, July 1	Supply	Disappearance 1/			Average price per pound
	Mil. lb.	Mil. lb.	Mil. lb.	Total	Domestic	Exports	Ct.
Average:							
1934-38	741	845	1,586	704	338	366	22.9
1941-45	902	1,349	2,251	992	617	375	38.5
1946	1,352	1,147	2,499	1,212	659	553	48.3
1947	1,317	1,287	2,604	1,054	695	359	41.2
1948	1,090	1,550	2,640	1,102	720	382	49.6
1949	1,115	1,538	2,653	1,168	729	439	47.2
1950	1,257	1,485	2,742	1,185	757	428	54.7
1951	1,453	1,557	3,010	1,279	777	502	52.4
1952	1,365	1,731	3,096	1,244	828	416	50.3
1953	1,272	1,852	3,124	1,209	778	431	52.8
1954	1,314	1,915	3,229	1,173	744	429	52.7
1955 2/	1,483	2,056	3,539	1,281	728	553	52.7
1956 2/	1,297	2,258	3,555				

	Parity price <u>3/</u>	Price support level	Placed under Government loan: Quantity	Remaining in Government loan stocks on August 31, 1956 <u>4/</u>	
	<u>Ct.</u>	<u>Ct.</u>	<u>Mil. lb.</u>	<u>Pct.</u>	<u>Mil. lb.</u>
1946	35.7	32.1	66.5	4.9	0
1947	44.4	40.0	232.3	17.6	0
1948	48.8	43.9	106.1	9.7	0
1949	47.2	42.5	103.5	9.3	0
1950	50.0	45.0	77.6	6.2	0
1951	56.3	50.7	142.2	9.8	0
1952	56.2	50.6	5/165.0	12.1	34.0
1953	53.2	47.9	151.4	11.9	36.0
1954	53.2	47.9	130.3	9.9	77.0
1955	53.7	48.3	298.1	20.1	276.0
1956	53.6	48.9	6/	6/	6/
Total	---	---	6/1,473.0	---	6/423.0

1/ Year beginning July 1. 2/ Subject to revision. 3/ As of applicable date when support level was computed. 4/ Actual loan stocks on a packed-weight basis average about 11 percent less than these farm-sales weight figures. 5/ An additional 78.4 million pounds under option to British manufacturers were pledged for CCC loans, but were purchased and shipped by mid-1953. 6/ Through mid-September, 89 1/2 million pounds, 15 percent of deliveries, placed under loan; 1956 loans not included in total.

least in 3 years. Flue-cured exports to both Japan and Indonesia jumped more than 70 percent from 1954-55 to 1955-56. Those in Denmark rose 24 percent and were the largest on record. Also, flue-cured shipments to Thailand, Egypt, Indochina, Austria, and Spain reached new highs. Other countries taking more flue-cured in 1955-56 than a year earlier were Finland, Norway, Switzerland, Portugal, Nigeria, Mexico, and Taiwan. Korea, hitherto not an outlet, got a sizable quantity of flue-cured in 1955-56 under a P. L. 480 program. Significant foreign outlets taking less flue-cured in 1955-56 than in 1954-55 were Sweden, New Zealand, Hong Kong, Pakistan, India, and France.

Exports during July (first month of 1956-57 marketing year) totaled about 19 million pounds (farm-sales weight)--far below the July 1955 figure, which included large P. L. 480 shipments, but fairly close to that normally shipped in July. Relatively substantial shipments were made to Germany, Egypt, Ireland, Netherlands, Belgium, Indonesia, and Denmark during July of this year.

Supplies

Carryover of flue-cured on July 1, 1956, totaled 2,258 million pounds--10 percent more than a year earlier and 18 percent more than 2 years earlier. The September 1 estimate of production is 1,297 million pounds--13 percent lower than last year's record crop and the second smallest since 1950. Although acreage for harvest is indicated to be down 11 percent from last year and the smallest since 1943, yields per acre may average 1,474 pounds--second only to last year's record high. Flue-cured tobacco growers took 10,329 of their allotted acres out of production by placing them in the "acreage reserve" of the Soil Bank Program. This Program went into effect after most of the 1956 crop had been planted.

The 1956-57 total supply--carryover plus this year's crop--at 3,555 million pounds slightly exceeds the 1955-56 level and is 10 percent above 1954-55. The supply of flue-cured is 2.9 times prospective annual disappearance compared with the average ratio of 2.5 for the 5 years prior to 1955-56. Carryover on July 1, 1957 is likely to be in excess of 2,300 million pounds--2 or 3 percent above this year's high level.

In July 1955 growers overwhelmingly approved marketing quotas for their 1956, 1957, and 1958 crops. The 1957 marketing quota and acreage allotment for flue-cured tobacco will be announced by the Secretary of Agriculture by December 1. The Soil Bank Program will be available to flue-cured tobacco growers in 1957 and greater participation than this year is expected because the program will be in the field earlier.

Price Support and Prices

The 1957 crop of flue-cured tobacco will be supported at 90 percent of parity as provided by law when marketing quotas are in effect. The Government price support for the 1956 crop is 48.9 cents per pound--three-fifths of a cent above the 1955 level.

The 1956 auction market prices for all types of flue-cured combined through September 20 averaged 51.8 cents per pound compared with 50.8 cents per pound in the corresponding period of 1955. In general, lower-and medium-price grades have brought higher prices than last season while the highest-priced grades have tended to be down a little.

Auction market volumes and prices in four of the belts through September 20 and those in the 1955 season are as follows:

	<u>1955</u>	<u>1956</u>	<u>1955</u>	<u>1956</u>
	<u>Mil. lb.</u>	<u>Mil. lb.</u>	<u>Ct. per lb.</u>	<u>Ct. per lb.</u>
Ga.-Fla., type 14 (sales finished)	213	183	46.5	48.0
S. C. and Border N. C., type 13	322	288	54.1	53.7
Eastern N. C., type 12	242	220	50.0	52.2
Middle Belt, type 11 (b)	51	28	51.1	53.3
Old Belt, type 11 (a) (Markets opened September 24 this year)				

In the Georgia-Florida Belt, marketings this year ran from July 25 through August 31. The volume was 14 percent less than last season but prices averaged 3 percent higher. Growers placed 13.6 million pounds--about 8 percent of market deliveries--under Government loan. This was substantially less than the record 31 million pounds (16 percent of deliveries) that went under loan last season but was more than in each of the preceding 3 seasons.

In the Border Belt where auctioning began August 2, marketings were probably 90 percent completed by September 20. The price average for sales through that date was only 1 percent less than in the corresponding period of last season. Poorer quality marketings of the early season sales lowered the overall price average. Receipts under Government loan through mid-September amounted to nearly 48 million pounds--19 percent of deliveries. In the 1955 season, a record 89 million pounds--26 percent of market deliveries went under loan.

In the Eastern Belt where auctions started August 23, prices through September 20 averaged 4.4 percent, higher than in the comparable period of last season. Receipts under Government loan through mid-September totaled about 25 million pounds--15 percent of deliveries compared with 27 percent in the comparable period of the 1955 season. In the entire 1955 season, a record 124 million pounds--25 percent of market deliveries--was placed under Government loan.

In the Middle Belt, where auctions opened September 10, prices through September 20 averaged 4.3 percent higher than in the comparable period. Receipts under Government loan through mid-September totaled nearly 3 million pounds--about one-fifth of deliveries and about the same proportion as early in the 1955 season. For the 1955 season as a whole, 23 million pounds--15 percent of deliveries--were placed under loan in this belt.

The Old Belt markets opened September 24--after the processing of this report started. In this Belt during the 1955 season, close to 31 million pounds--11 percent of deliveries--were placed under Government loan. This was well below the amount for most previous seasons.

Burley, Type 31

Domestic Use and Exports

Disappearance of burley in the October 1955-September 1956 marketing year is estimated at about 508 million pounds--2 percent lower than in 1954-55. Domestic use probably amounted to about 475 million pounds--roughly 10 million less than a year earlier while exports held fairly close to the 33 million pounds of a year earlier. A large share of burley is used in manufacture of cigarettes which increased, but sizable quantities go into smoking and chewing tobacco which decreased. The cigarette output increased more than enough to offset the decline in burley use resulting from the fairly sharp decline in smoking tobacco and moderate decrease in chewing tobacco. Since total domestic use declined, it appears that the increased number of cigarettes did not require a proportionately larger amount of burley and that actually less burley leaf was used per cigarette. The main reasons why less leaf is being used in cigarettes are discussed on page 6.

The 1956-57 use of burley seems likely not to be much different from 1955-56 even though the number of cigarettes manufactured will probably continue to increase.

The 1955-56 exports of burley are estimated at near the 33 million pounds (farm-sales weight)--fairly close to the 1954-55 level. During October 1955-July 1956 (five-sixths of the full marketing year), total burley exports were actually a little ahead of the corresponding period in 1954-55. West Germany, the leading outlet, took one-fourth more than a year earlier. Also, Portugal, the second ranking outlet, took 16 percent more but Belgium, the third ranking outlet, took 5 percent less than in the October 1954-July 1955 period. Sweden and Mexico, the fourth and fifth ranking outlets for burley, took substantially more than in the same 10 months of a year earlier when shipments were unusually low. However, other important foreign destinations such as Netherlands, France, Philippine Republic, Denmark, Austria, Australia, and Hong Kong all took less, some much less burley in October 1955-July 1956 than in the corresponding period of a year earlier and none was reported to Italy in contrast to sizable amounts in each of the preceding 2 years. Egypt, Finland, and Norway each got significantly larger amounts of burley than in the same months of a year earlier and shipments to Switzerland increased moderately.

Supplies

The carryover of burley on October 1, 1956, is expected to be about 1,309 million pounds--3 percent below the record high of a year earlier but above the carryover for any preceding year. The September 1 estimate of the

(Farm-sales weight)

	Parity price <u>3</u> /	Price support level	Placed under Government loan: Quantity	Government loan: Percentage of crop	Remaining in Government loan stocks on August 31, 1956 <u>4</u> /
	<u>Ct.</u>	<u>Ct.</u>	<u>Mil. lb.</u>	<u>Pct.</u>	<u>Mil. lb.</u>
1946	37.3	33.6	147.8	24.1	0
1947	44.8	40.3	37.7	7.8	0
1948	47.1	42.4	96.7	16.0	0
1949	44.8	40.3	39.1	7.0	0
1950	50.8	45.7	44.2	8.9	0
1951	55.3	49.8	97.3	15.7	36.5
1952	55.0	49.5	103.9	16.0	24.0
1953	51.8	46.6	102.1	17.9	64.5
1954	51.5	46.4	221.4	33.2	179.0
1955	51.3	46.2	73.0	15.5	73.0
1956	52.5	<u>5</u> /47.2			
Total	---	---	963.2	---	377.0

*Preliminary estimate.

1956 crop is 485 million pounds--3 percent larger than last year when production was the smallest since 1943. The burley acreage allotment this year and last was about 25 percent lower than in 1954 and the 311,900 acres harvested in 1956 vary only slightly from a year ago. The burley acreage this year and last are the lowest since the mid-1930's. Indicated yields per acre as of September 1 at 1,556 pounds were 3 percent greater than last year's and second only to the 1954 yield of 1,586 million pounds. Burley growers placed 3,752 of their allotted acres in the "acreage reserve" of the Soil Bank Program. Most 1956 burley had already been planted when the Soil Bank Program became operative.

The 1956-57 total supply of burley--the carryover plus the new crop--will be about 1,794 million pounds--about 1 percent less than 1955-56 and 4 percent less than the peak level of 1954-55. The 1956-57 total supply is 3.5 times prospective disappearance compared with a ratio of 3.6 in each of the preceding 2 years. In the 5 years prior to that, this ratio had increased year by year from 2.9 to 3.3. Carryover of burley on October 1, 1957, seems likely to be 1 or 2 percent lower than that estimated for October 1, this year.

In December 1955 burley growers overwhelmingly approved marketing quotas for their 1956, 1957, and 1958 crops. The 1957 marketing quota and acreage allotment for burley tobacco will be announced by the Secretary of Agriculture on or before February 1, 1957. (Heretofore, the latest date it could be announced was December 1 but the law was amended to extend the final date to February 1 for each kind of tobacco except flue-cured. This makes possible the use of a better estimate of current production in determining the marketing quota for the next crop.) The Soil Bank Program will be available to burley growers in 1957 and greater participation is expected than in 1956 because the program will be started earlier.

Price Supports and Prices

The 1957 crop of burley tobacco will be supported at 90 percent of parity as provided by law since marketing quotas are in effect.

The minimum level of support (announced last April) for the 1956 crop is 47.2 cents per pound. The actual level of support for the 1956 crop will be 47.2 cents or 90 percent of the October 1 parity price, whichever is higher. The parity price for burley when the minimum support was calculated was 52.5 cents but rose to 53.6 cents by August of this year. Ninety percent of the August parity is 48.2 cents per pound.

The small but generally high quality 1955 crop of burley brought a record 58.6 cents per pound. Prices of middle and lower grades advanced considerably while a substantial quantity of traditionally higher-priced grades went under Government loan. Total receipts under Government loan at 73 million pounds, though the least in 5 years, amounted to 15 1/2 percent of the crop.

Maryland, Type 32 3/Domestic Use and Exports

The total disappearance of Maryland tobacco in the October 1955-September 1956 marketing year is estimated at about 36 million pounds--not greatly different from 1954-55. A rise in exports apparently largely offsets a decrease in domestic use. Domestic use is estimated to have been 25 or 26 million pounds--moderately less than a year earlier. This is in keeping with the lower use of the two major cigarette types, flue-cured and burley.

Exports of Maryland are estimated at close to 11 million pounds (farm-sales weight)--more than one-third larger than in each of the 2 preceding years and probably the largest since the mid-1920's. During the first 10 months of 1955-56, Switzerland, accounting for 60 percent of the total exports of this type, took about 41 percent more than in the same period of a year earlier and more than in any marketing year since 1948-49. West Germany, the second ranking outlet and accounting for 15 percent of the total, about tripled her takings of recent years and took more than in any previous year since the early 1920's. Also, the October 1955-July 1956 shipments of Maryland tobacco to Netherlands, Belgium and Austria were higher than in the corresponding months of a year earlier but less went to France and Tunisia. However, Morocco got a sizable shipment in contrast to none a year ago.

Supplies

The carryover of Maryland tobacco on January 1, 1956, was 77 1/2 million pounds--13 percent above a year earlier and a record high. The 1956 auction sales and hogshead market receipts of mostly 1955 crop tobacco have totaled around 32 million pounds. The 1955 crop was sharply reduced by storms. It seems likely that January 1, 1957, carryover will be around 74 million pounds. The September 1 estimate for the 1956 Maryland crop is 46 1/4 million pounds--well above last year's small outturn and probably the largest on record. Maryland growers placed 3,915 of their allotted acres in the "acreage reserve" of the Soil Bank Program. This year's crop plus the anticipated carryover next January 1 will provide a total supply of around 120 million pounds--the highest on record.

In December 1955, Maryland tobacco growers approved marketing quotas for their 1956, 1957 and 1958 crops. The 1957 marketing quota and acreage allotment for Maryland tobacco will be announced by the Secretary of Agriculture on or before February 1, 1957. Also, the Soil Bank Program will be available to Maryland tobacco growers in 1957.

3/ For marketing quota purposes, the carryover and total supply of Maryland tobacco are calculated as of January 1 falling within the marketing year--the 12-month period, October 1 through September 30. Disappearance is calculated on the October-September basis.

(Farm-sales weight)

1/For marketing quota purposes, the carryover and total supply of Maryland tobacco are calculated as of January 1 falling within the marketing year--October 1 through September 30. 2/Year beginning October 1. 3/ Subject to revision. 4/ Auction market average. 5/As of applicable date when support level was computed or October 1. 6/Actual loan stocks on a packed-weight basis average about 2 percent less than these farm-sales weight figures. 7/No support since marketing quota was not approved by two-thirds of growers voting. 8/Minimum--subject to upward revision if parity price is higher as of October 1.

*Preliminary estimate.

Price Support and Prices

The 1957 crop of Maryland tobacco will be supported at 90 percent of parity as provided by law since marketing quotas are in effect.

The minimum level of support (announced last April) for the 1956 crop is 46.2 cents per pound. The actual level of support for the 1956 crop will be 46.2 cents or 90 percent of the October 1 parity, whichever is higher. The parity for Maryland when the minimum support was calculated was 51.3 cents but rose to 52.4 cents by August of this year. Ninety percent of this more recent parity is 47.2 cents per pound. Most of the Maryland crop is marketed from May to August of the year following its production.

The auctioning of mostly 1955 crop Maryland tobacco was completed by July 27 of this year. The auction average price for the relatively small sales was 50.2 cents per pound--10.7 cents more than in the previous season and the third highest since the war. In addition to the producers' sales of 27.7 million pounds at auctions, about 1.9 million pounds were received at the Baltimore hogshead market by late July.

Fire-Cured, Types 21-23

Domestic Use and Exports

Disappearance of fire-cured tobacco in the October 1955-September 1956 marketing year is estimated at 64 million pounds--about 8 percent larger than in 1954-55 and the most in 5 years. Indications are that domestic use was near 32 million pounds--about 2 million more than in 1954-55. Most domestically used fire-cured tobacco goes into snuff manufacture, which fluctuates little from year to year.

Exports of fire-cured tobacco in 1955-56 are estimated at about 32 million pounds (farm-sales weight)--nearly 10 percent more than last year and the largest since 1950-51. During the first 10 months of the 1955-56 marketing year, exports of Kentucky-Tennessee fire-cured were 8 percent ahead of that in the comparable 1954-55 period despite the smaller quantities going to the two leading outlets, France and Netherlands. French and Dutch takings declined 31 and 17 percent, respectively. However, Switzerland, ranking third, got substantially more than in the entire 12 months' period of each of the preceding 2 years. Italy, the fourth ranking outlet in October 1955-July 1956, took more than in the comparable period of a year earlier and far greater amounts than in each of several preceding years. Sweden, ranking fifth, took much more than in each of the previous 2 years. Belgium took more than in each of the previous 3 years and that going to Denmark was considerably higher than in the same months of a year earlier. Indochina and Canary Islands each took substantial quantities in contrast to none or very little last year. However, the United Kingdom took sharply less during October 1955-July 1956 than the sizable shipments in the same period of 1954-55 and less went to French West Africa, Belgian Congo, Gold Coast, and Norway. West Germany took a little more and there were significant increases to Indonesia, Portugal, and Ireland.

Table 16.--Fire-cured tobacco, types 21-23^{1/}: Domestic supplies, disappearance, season average price, and price support operations for specified periods

(Farm-sales weight)

Year	Production	Stocks, Oct. 1	Supply	Disappearance 2/			Average
				Total	Domestic	Exports	price per pound
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Ct.
Average:							
1934-38	110.2	194.2	304.4	123.0	53.2	69.8	10.2
1941-45	66.1	170.7	236.8	81.9	49.6	38.3	22.1
1946	108.9	104.9	213.8	70.4	36.0	34.4	26.0
1947	86.4	143.4	229.8	67.2	36.9	30.3	29.5
1948	73.2	162.6	235.8	77.9	34.7	43.2	31.9
1949	72.2	157.9	230.1	65.2	36.5	28.7	29.8
1950	58.3	164.9	223.2	76.0	36.7	39.3	31.2
1951	59.5	147.2	206.7	59.8	32.2	27.6	40.0
1952	58.2	146.9	205.1	58.8	29.6	29.2	37.6
1953	48.9	146.3	195.2	61.2	32.9	28.3	33.8
1954	62.2	134.0	196.2	59.1	29.9	29.9	37.8
1955 3/	65.2	137.1	202.3	*64.0	*32.0	*32.0	37.3
1956 3/	65.2	*138.0	*203.2				
	Parity price 4/	Price support level 5/	Placed under Government loan: Quantity	Percentage of crop	Remaining in Government loan stocks on August 31, 1956 6/		
	Ct.	Ct.	Mil. lb.	Pct.	Mil. lb.		
1946	17.8	25.2	40.8	37.5	0		
1947	21.5	30.2	31.3	36.2	2.8		
1948	22.6	31.8	27.3	37.3	4.3		
1949	21.5	30.2	18.7	25.9	5.0		
1950	30.3	34.3	12.2	20.9	7.7		
1951	33.6	37.4	7.5	12.6	4.5		
1952	34.8	37.1	10.9	18.7	5.6		
1953	34.4	35.0	8.2	16.8	4.4		
1954	34.8	34.8	6.9	11.1	4.8		
1955	35.8	34.6	9.7	14.7	9.3		
1956	35.5	7/35.4					
Total	---	---	173.5	---	48.4		

1/ Type 24 included until early 1950's when it became practically nonexistent.
2/ Year beginning October 1. 3/ Subject to revision. 4/ As of applicable date when support level was computed. 5/ Not based on parity but set by law at 75 percent of the burley support. 6/ Actual loan stocks on a packed-weight basis average about 6 percent less than these farm-sales weight figures. 7/ Minimum--subject to upward revision if burley support level increases as of October 1.

*Preliminary estimate.

Exports of Virginia fire-cured during the first 10 months of 1955-56 were larger than for all of 1954-55 and almost as much as all of 1953-54. Norway, the leading outlet, took 29 percent more than in the comparable period of 1954-55. Sweden and Netherlands, two other sizable outlets, each got more than in any entire year since 1947-48. United Kingdom takings were up sharply and may be the largest since 1949-50. Also, the Swiss takings were well above a year earlier and Australia and Germany showed increases, but shipments of Virginia fire-cured to New Zealand were lower than in the comparable period of 1954-55.

Supplies

The October 1, 1956, carryover is estimated at approximately 138 million pounds--very little more than a year earlier. The September estimate of production is 65 million pounds, also virtually the same as last year's. Acreage allotments were practically unchanged from 1955 and acreage for harvest is indicated at only a little less than last year's. Growers placed about 1,951 of their allotted acres in the "acreage reserve" of the Soil Bank Program. Yields per acre in the Virginia producing area are indicated to be above those in each of the 3 previous years and also at record or near-record levels for the Kentucky-Tennessee types.

The 1956-57 total supply of fire-cured tobacco at approximately 203 million pounds is slightly more than for 1955-56 and the largest since 1952-53. Carryover on October 1, 1957, may be up a little from its current level.

In December 1954, a large majority of the growers of fire-cured tobacco approved marketing quotas for their 1955, 1956, and 1957 crops. The 1957 marketing quota and acreage allotment for fire-cured tobacco will be announced by the Secretary of Agriculture on or before February 1, 1957. The Soil Bank Program will be available also and there may be greater participation than in 1956.

Price Supports and Prices

The 1957 crop of fire-cured tobacco will be supported at 75 percent of the burley support level as provided by law since marketing quotas are in effect.

The minimum level of support (announced last April) for the 1956 fire-cured crop is 35.4 cents per pound. The actual level of support for the 1956 crop will be 35.4 cents or 75 percent of the October 1 burley support, whichever is higher. The burley parity has risen since minimum supports were calculated and, if based on August figures, the fire-cured support level would be 36.2 cents per pound.

The combined fire-cured types averaged 37.3 cents per pound for the 1955 crop. The Virginia type 21 at 31.3 cents was 3.1 cents below the preceding season, but the Kentucky-Tennessee types at 40.5 and 32.4 cents were only about one-third of a cent less than the year before.

Last season, growers placed under Government loan nearly 1.8 million pounds (17 percent of the crop) of Virginia fire-cured, 5.1 million pounds (12 1/2 percent of the crop) of Kentucky-Tennessee type 22, and almost 2.8 million pounds (21 percent of the crop) of Kentucky-Tennessee type 23. Government loan stocks of fire-cured tobacco still contain substantial quantities from the crops of several years back.

Dark Air-Cured and Sun-Cured, Types 35-37

Domestic Use and Exports

Disappearance of dark air-cured and sun-cured tobacco in the October 1955-September 1956 marketing year is estimated at 26 million pounds--3 million less than in 1954-55 and the smallest on record. Domestic use, estimated at about 20 million pounds, is about 1 million above the low 1954-55 figure, but exports at around 6 million pounds (farm-sales weight), are indicated to be around 4 million lower than in 1954-55. The principal domestic outlet is in chewing tobacco, which continues to decline. Some dark air-cured tobacco probably is used as cigar filler.

The exports of dark air-cured are largely in the form of Black Fat but also some as Green River and One Sucker leaf tobacco. In the first 10 months of the 1955-56 marketing year, exports of Black Fat were 21 percent smaller than in the comparable period of 1954-55. Nigeria, accounting for nearly three-fifths of the total, took 7 percent less than a year earlier and shipments to Gold Coast, usually the second ranking outlet, declined 8 percent. However, Black Fat going to French West Africa, third ranking outlet, was less than one-fifth as much as in the same months of a year earlier. During October 1955-July 1956, exports of Green River leaf were only about one-third as much as in the same months of a year earlier. The shipments to the United Kingdom--the leading outlet--were down very sharply and none had yet been reported as going to France, the second ranking outlet, last year. Belgium got a sizable amount in contrast to none a year earlier and shipments to Netherlands increased moderately. The 1955-56 shipments of One Sucker appear to have been substantially lower than in 1954-55 when a sizable quantity went to Madagascar for the first time.

Supplies

The October 1, 1956, dark air-cured and sun-cured carryover is estimated at 86 million pounds--about 5 million more than a year earlier and the highest in many years. The September estimate of 1956 production is about 31 1/2 million pounds--slightly greater than in 1955 and about one-half million above the 1950-54 average. Allotments were about the same as in 1955 while acreage indicated for harvest was down a little. Except in the Tennessee area, yields per acre of One Sucker and Green River tobacco are indicated to be generally above last year's favorable yields. The sun-cured tobacco harvest is indicated to be substantially above last year, with yields per acre averaging sharply above the low 1955 figure. Growers of types 35-36 (Kentucky-Tennessee darkair-cured)

(Farm-sales weight)

1/ Year beginning October 1. 2/ Subject to revision. 3/ As of applicable date when support level was computed. 4/ Not based on parity but set by law at 66 2/3 percent of the burley support. 5/ Actual loan stocks on a packed-weight basis average about 8 percent less than these farm-sales weight figures. 6/ An additional 200,000 pounds under option to British manufacturers were pledged for CCC loans but were purchased and shipped by mid-1953. 7/ Minimum--subject to upward revision if burley support level increases as of October 1.
*Preliminary estimate.

placed about 919 of their allotted acres in the "acreage reserve" of the Soil Bank Program while growers of type 37 (Virginia sun-cured) placed 1,779 allotted acres in the "acreage reserve."

The 1956-57 total supply of dark air- and sun-cured tobacco--carryover plus this year's ~~crop--is~~ nearly 118 million pounds compared with 112 million for 1955-56. This is the largest supply since the early 1930's and carryover by October 1957 probably will reach its highest point in many years.

In December 1954, Kentucky-Tennessee growers approved marketing quotas on their 1955, 1956, and 1957 crops; and last December, growers of Virginia sun-cured approved quotas on their 1956, 1957, and 1958 crops. On or before February 1, 1957, the Secretary of Agriculture will announce the 1957 marketing quotas and acreage allotments for these types. The Soil Bank Program will be available at an earlier date than in 1956.

Price Supports and Prices

The 1957 crop of dark air-cured and sun-cured tobacco will be supported at 66 2/3 percent of the burley support as provided by law since marketing quotas are in effect.

The minimum level of support (announced last April) for the 1956 dark air- and sun-cured crop is 31.5 cents per pound. The actual level of support for the 1956 crop will be 31.5 cents or 66 2/3 percent of the October 1 burley support, whichever is higher. The burley parity has risen since minimum supports were calculated. Based on the August figures, the dark air- and sun-cured support level would be 32.1 cents per pound.

Last season these types combined brought an average of 31.1 cents per pound--3 cents below a year earlier. The type 35 average for the 1955 crop was 33.1 cents--only 1 cent less than the record high of a year earlier. Due mainly to more low quality tobacco, the type 36 average at 29.3 cents and the type 37 average at 25.3 cents were down more sharply--5.4 and 6.9 cents, respectively, below the previous season.

During the 1955 crop marketing season, growers placed 4.2 million pounds of One Sucker (type 35) and 2.1 million pounds of Green River (type 36) under Government loan. This represented more than one-fifth of the 1955 production of these types. Only about 72,000 pounds of Virginia sun-cured went under loan. Government loan stocks from previous crops of dark air-cured tobacco are still substantial.

Cigar, Types 41-62

Domestic Use and Exports

The 1955-56 disappearance of the continental filler types (41-44) is estimated at 58 million pounds--7 or 8 million larger than the low 1955-56 figure but about 3 million under both 1954-55 and 1953-54. The main outlet

of these filler types is in domestic cigar manufacture, which has been running ahead of a year ago. Only a relatively insignificant quantity of domestic filler tobacco is exported, but .4 million pounds (farm-sales weight) went to Indochina during October 1956-April 1957.

The total disappearance of the combined binder types (51-55) in the October 1955-September 1956 marketing year is estimated at about 48 million pounds--about 3 million below 1954-55. The indications are that the drop in domestic use during 1955-56 has not been as much as expected earlier. However, use of "reconstituted" or "homogenized" binder sheet is increasing and 1956-57 domestic use of the binder types will probably fall off further. The lower grades of the cigar binder types generally go for scrap chewing manufacture. The utilization of such grades in the manufacture of "reconstituted" or "homogenized" binder seems likely to diminish the supplies of tobacco that have been traditionally available for scrap chewing tobacco manufacture. Exports of binder types of tobacco declined from about 3.9 million pounds (farm-sales weight) in 1952-53 to about 1.6 million in 1954-55. During October 1955-April 1956, exports of binder were about 1.8 million pounds--sharply above the 1.1 million in the same months of 1954-55. The major increases were Connecticut Valley Havana Seed (type 52) going to Germany, Netherlands, and Austria. There were also sizable relative increases over a year earlier of Connecticut Valley Broadleaf (type 51) going to Netherlands, West Germany, and Canada. During October 1955-April 1956, West Germany, the leading outlet, took about the same quantity of the Wisconsin binder types as a year earlier, but Sweden and Canada took increased amounts and also, some went to Austria in contrast to none a year earlier.

The total disappearance of shade-grown wrapper (types 61-62) in the July 1955-June 1956 marketing year was 16.5 million pounds--the same as in 1954-55. The increase in the disappearance of Georgia-Florida wrapper (type 62) offset the decrease in the disappearance of the Connecticut Valley (type 61). Domestic use of types 61-62 at about 11 1/2 million pounds was lower than in each of the preceding 3 years. However, 1955-56 exports of these wrapper types at over 5 million pounds (farm-sales weight) were over one-fifth above 1954-55 and the largest on record. Exports of wrapper leaf to Germany (the destination for 57 percent of the total) increased 35 percent. Netherlands took considerably more and Canada slightly more than in 1954-55 but less went to Belgium and Switzerland.

Supplies of Filler and Binder

Filler: The October 1 carryover of Pennsylvania and Ohio filler (types 41-44) is estimated at 131 million pounds--4 percent lower than a year earlier. The September estimate of production is 56 million pounds--5 percent larger than the 1955 harvest. Acreage in Pennsylvania is indicated at about the same as last year but yields per acre may average the highest on record. Acreage of types 42-44 in Ohio is indicated to be sharply less than last year's and the smallest on record, but yields per acre may be second only to the 1954 record average. The Ohio filler types are under acreage allotment and the Pennsylvania type is not. Ohio growers placed 117 of their allotted acres in the "acreage reserve" of the Soil Bank Program.

Table 18.- Cigar tobacco, types 41-55: Domestic supplies, disappearance, and season average prices for specified periods

(Farm-sales weight)							
Year	Production	Stocks Oct. 1	Supply	Disappearance 1/			Average price per pound
				Total	Domestic	Exports	
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Cents
Filler types							
41-44							
Average:							
1934-38 2/	48.9	159.9	208.8	54.4			10.4
1941-45	54.4	153.1	207.5	60.1			19.6
1946	57.3	128.8	186.1	63.9			32.9
1947	60.6	122.2	182.8	59.1			30.6
1948	68.3	123.7	192.0	60.1	59.4	0.7	25.8
1949	65.4	131.9	197.3	53.5	52.8	.7	26.2
1950	66.5	143.8	210.3	52.9	52.3	.6	25.2
1951	63.4	157.4	220.8	59.8	59.1	.7	19.6
1952	46.7	161.0	207.7	61.2	60.8	.4	25.2
1953	44.7	146.5	191.2	61.4	61.2	.2	26.2
1954	56.8	129.8	186.6	50.7	50.6	.1	26.7
1955 3/	53.2	135.9	189.1	*58.0			24.1
1956 3/	56.1	*131.1	*187.2				
Binder types							
51-55 4/							
Average:							
1934-38	41.8	165.1	206.9	60.5			12.5
1941-45	57.8	122.4	180.2	64.4			29.3
1946	74.1	103.5	177.6	53.9			52.6
1947	69.4	123.7	193.1	67.3			43.8
1948	60.5	125.8	186.3	63.1	52.0	11.1	41.1
1949	61.7	123.2	184.9	49.8	46.4	3.4	36.0
1950	64.2	135.1	199.3	56.8	54.0	2.8	35.8
1951	49.3	142.5	191.8	57.0	54.1	2.9	38.1
1952	46.6	134.8	181.4	56.2	52.3	3.9	38.6
1953	46.9	125.2	172.1	52.3	50.2	2.1	44.7
1954	48.2	119.8	168.0	51.1	49.5	1.6	40.6
1955 3/	42.0	116.9	158.9	*48.0			34.4
1956 3/	31.1	*110.9	*142.0				

*Preliminary estimate.

1/ Year beginning October 1.

2/ Includes small quantity of type 45.

3/ Subject to revision.

4/ Includes small quantity of type 56 through 1948.

The 1956-57 total supply of the continental cigar filler types--carry-over plus this year's crop--at about 187 million pounds is about 2 million lower than 1955-56 and practically the same as for 1954-55.

Puerto Rico produces and ships significant quantities of cigar filler to the United States. (See table 19). On July 1, stocks of Puerto Rican tobacco (type 46) in the United States totaled nearly 31 million pounds--27 percent more than a year earlier. Stocks on the Island totaled 40 million pounds--11 percent less than the relatively high level of a year earlier. The Puerto Rican crop planted late last year and mostly harvested during the first part of 1956 amounted to about 30 million pounds--12 percent less than a year earlier.

Table 19. Shipments of tobacco from Puerto Rico to the United States for specified periods

(Declared weight)					
Classification	Average	Average	Average	Year beginning July	
	1924-28	1934-38	1949-53	1954	1955
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.
Stemmed	16.1	17.4	11.2	12.4	13.6
Unstemmed	5.1	.1	1.1	1.0	.9
Scrap	5.8	5.0	6.1	5.7	7.2
Total	27.0	22.5	18.4	19.1	21.7

Compiled from publications and records of the Bureau of the Census.

Binder: The October 1 carryover of the combined binder types is estimated at close to 111 million pounds--about 6 million lower than a year ago and the lowest since 1946. The September estimate for production is about 31 million pounds--26 percent lower than last year's crop and less than half the 1947-49 average. Acreage was indicated to be 26 percent below last year's and one of the smallest on record. These types are produced under acreage allotments which were cut about 12 1/2 percent below last year's, and a substantial number of the allotted acres were placed in the "acreage reserve" of the Soil Bank Program. Connecticut Valley Broadleaf (type 51) and Havana Seed (type 52) acreages were cut about 40 and 33 percent, respectively, below last year--the lowest on record for Broadleaf and the second lowest on record for Havana Seed. Broadleaf and Havana Seed growers placed 3,525 and 3,220 of their allotted acres, respectively, in the "acreage reserve" of the Soil Bank Program. Yields per acre are indicated to be near last year's average. The Southern Wisconsin (type 54) and Northern Wisconsin (type 55) acreages are about 7 and 20 percent lower, respectively, than last year. The type 54 acreage is the smallest on record and the type 55 acreage, the lowest except for the 1933-36 period. Growers of types 54 and 55 placed 338 and 1,826 of their allotted acres in the "acreage reserve" of the Soil Bank Program. Yields per acre are indicated to be up a little from last year's average.

The 1956-57 total supply of the binder types--the carryover plus this year's crop is likely to be near 142 million pounds--11 percent less than for 1955-56 and over 15 percent below that for 1954-55. This will be the smallest supply on record and represents an adjustment towards the reduced requirement for binder leaf resulting from the development of manufactured binder sheet.

Marketing Quotas and Acreage Allotments

The Secretary of Agriculture will announce a marketing quota and acreage allotments for 1957 for the cigar filler and binder types 42-44 and 51-55 by February 1, 1957. Unless at least one-fourth of Pennsylvania cigar filler growers petition for it, no quota will be announced for their tobacco--type 41. The growers of types 42-44 and 51-55 will vote in a referendum as to whether they favor quotas for the next 3 crops. At least two-thirds of the growers voting must approve to place quotas in effect. The last referendum for types 42-44 and 51-55 was in 1953 when quotas were approved on the 1954, 1955, and 1956 crops by a majority of 77 percent of the growers voting.

Supplies of Shade- Grown Wrapper

The carryover of shade-grown wrapper on July 1, 1956, was 17.0 million pounds--about 1 million less than July 1 of each of the 2 preceding years. Stocks of both the Connecticut Valley type 61 and Georgia-Florida type 62 declined from a year earlier. The September production estimate for this year's crop was 16.1 million pounds--about one-half million greater than last year's harvest. The Connecticut Valley crop of wrapper is indicated at 9.6 million pounds--9 percent larger than last year when the size of the crop was reduced by storms. Yields per acre may average the second highest on record. The Georgia-Florida crop is estimated at 6.5 million pounds--about 4 percent lower than last year's. Acreage is indicated to be up a little but yields per acre are indicated to be 7 or 8 percent lower than in 1955 and 1954--both being years with high average yields.

The total supply of domestic shade-grown wrapper for 1956-57 at a little over 33 million pounds is about one-half million less than for 1955-56 and the smallest since 1948-49.

Price Supports and Prices

When marketing quotas are in effect on eligible cigar tobacco types, price support at 90 percent of parity is mandatory. If growers of cigar filler types 42-44 and binder types 51-55 approve marketing quotas in the referendum to be held by early next year, prices for the next 3 crops will continue to be supported at 90 percent of the applicable parity.

The minimum levels of support (announced last April) for the 1956 crops of these types are shown in table 21. The actual supports for the 1956 crops will be these minimums or levels based on 90 percent of the October 1 parity

Table 20.- Cigar wrapper tobacco, types 61-62: Domestic supplies, disappearance, and season average prices for specified periods

(Farm-sales weight)							
Year	Production	Stocks, July 1	Supply	Disappearance 1/			Average price per pound
				Total	Domestic	Exports	
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Cents
Average:							
1934-38	8.4	11.8	20.2	9.3			78.3
1941-45	10.4	13.6	24.0	10.2			160.7
1946	12.5	13.6	26.1	12.7			234.0
1947	13.5	13.4	26.9	12.4			296.0
1948	15.1	14.5	29.6	13.0	10.5	2.5	274.0
1949	17.3	16.6	33.9	14.5	10.8	3.7	201.0
1950	15.5	19.4	34.9	14.9	11.3	3.6	203.0
1951	14.9	20.0	34.9	13.7	10.1	3.6	194.0
1952	14.7	21.2	35.9	16.6	12.2	4.4	198.0
1953	14.8	19.3	34.1	15.9	12.2	3.7	202.0
1954	16.4	18.2	34.6	16.6	12.4	4.2	207.0
1955 2/	15.6	18.0	33.6	16.6	11.5	5.1	212.0
1956 2/	16.1	17.0	33.1				

1/ Year beginning July 1. 2/ Subject to revision.

for the group total, whichever are higher. Parity has risen in the last few months and 90 percent of the August parity for types 42-44 and 51-55 was 37.6 cents per pound--four-fifths of a cent higher than when the minimums were calculated.

Puerto Rican (type 46) tobacco is not under a Federal marketing quota and its support level is related to its supply position. The 1955-56 crop was supported at 88 percent of its parity. The support price for the 1956-57 Puerto Rican crop to be planted late this year will reflect its supply position and be based on its October 1 parity level.

Table 22 indicates the quantities placed under Government loan in past years. Exceptionally large quantities of Broadleaf (type 51), Havana Seed (type 52), and Northern Wisconsin (type 55) went under loan from the 1955 crops.

: : The Tobacco Situation is published in March, : June, September and December. The next issue : is scheduled for release on December 26, 1956 :

Table 21.- Cigar tobacco, types 41-62: Government support levels and season average prices for specified periods

Type	1949-53 season average price	1954 loan level	1954 season average	1955 loan level	1955 season average	1956 minimum support
	Cents per pound	Cents per pound	Cents per pound	Cents per pound	Cents per pound	Cents per pound
Pennsylvania filler, type 41	24.9	1/	27.4	1/	24.5	1/
Ohio cigar filler, types 42-44	22.3	25.1	22.5	24.7	21.8	23.0
Puerto Rican filler, type 46	28.1	32.6	30.5	31.9	2/25.0	3/
Conn. Valley Broadleaf binder, type 51	52.9	53.8	56.5	53.9	46.9	51.6
Conn. Valley Havana Seed binder, type 52	45.6	51.5	44.0	50.8	39.7	48.3
Pa. Havana Seed binder, type 53	22.9	25.7	24.0	25.0	21.0	23.3
Southern Wis. binder, type 54	23.1	25.1	24.3	24.5	22.9	22.6
Northern Wis. binder, type 55	30.2	31.9	32.7	32.0	24.6	29.0
Conn. Valley shade-grown wrapper, type 61	206.0	4/	215.0	4/	240.0	4/
Ga.-Fla. shade-grown wrapper, type 62	190.0	4/	195.0	4/	175.0	4/

1/ Government price support not in effect on type 41. 2/ Preliminary. 3/ Support level to be announced on October 1, 1956. 4/ Mandatory loans not applicable.

Table 22.- Cigar tobacco price support operations, quantities placed under loan, 1946-55

Crop year	Ohio, types 42-44	Puerto Rican, type 46	Conn. Valley, type 51	Conn. Valley, type 52	So. Wis., type 54	No. Wis., type 55	Total 1/
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
1946	0	10.6	0	0	2.2	0	12.8
1947	0	10.3	0	0	.8	0	11.1
1948	0	12.3	0	0	2.0	3.0	17.3
1949	0	9.3	.1	3.2	.2	.5	13.3
1950	2.6	.3	.1	3.7	1.4	.6	11.5
1951	.6	1.1	1.7	2.7	4.8	.1	11.0
1952	2/	1.4	2/	2/	2/	2/	1.4
1953	2.7	1.4	3/	1.8	2.4	1.9	10.3
1954	1.2	5.1	.8	3.4	1.3	.9	12.7
1955	.8	2.8	7.8	5.2	.4	3.1	20.1
Total	7.9	54.6	10.5	20.0	15.5	10.1	121.5
Remaining as of August 31 1956	2.0	1.7	7.1	5.8	4.2	3.6	24.4

1/ Includes 2.8 million pounds of 1950 crop Pennsylvania Seedleaf (type 41) and negligible amounts from the 1950, 1951, and 1953 crops of New York and Pennsylvania Havana Seed (type 53). 2/ Price support not in effect because marketing quotas were disapproved by growers. 3/ Less than 50,000 pounds.

Table 23.- Tobacco: Acreage in the United States, by types, for specified periods with percentages

Period	Cigar								United States
	Flue-cured 11-14	Fire-cured 21-24 1/	Burley: 31	Mary- land 32	Dark air- cured 35-37	Filler: 41-45 1/	Binder: 51-56 1/	Wrapper: 61-62	
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres
Average:									
1924-28	893.7	224.4	322.2	31.2	85.9	68.1	64.0	9.6	1,700.3
1929-33	949.5	204.3	460.9	36.1	64.5	65.3	56.3	9.0	1,847.3
1934-38	863.2	135.2	347.2	36.7	42.0	38.7	29.2	8.9	1,501.3
1939	1,269.9	114.5	424.7	40.0	48.7	48.8	41.2	10.9	1,999.7
1940	741.0	119.9	360.3	38.4	47.0	48.4	44.4	10.3	1,410.2
1941	717.6	74.5	341.9	40.3	32.6	47.6	41.0	10.8	1,306.5
1942	792.7	72.8	350.6	38.0	34.0	43.1	36.3	9.6	1,377.3
1943	842.8	68.8	399.3	35.3	30.9	37.9	33.1	9.6	1,458.0
1944	1,017.3	64.7	496.6	45.0	40.2	37.9	37.3	10.5	1,749.9
1945	1,078.7	61.3	512.3	35.0	44.1	36.0	41.8	11.2	1,820.7
1946	1,188.8	91.6	489.0	50.0	40.8	39.0	48.8	12.5	1,960.8
1947	1,161.2	83.8	420.5	47.5	35.3	42.7	46.4	13.6	1,851.6
1948	883.8	62.6	432.0	46.6	29.9	43.6	39.7	15.1	1,553.6
1949	935.4	60.7	447.4	50.0	31.9	42.4	39.5	15.6	1,623.2
1950	958.4	52.9	408.3	50.0	28.7	45.1	41.5	13.7	1,599.0
1951	1,110.1	49.0	456.1	53.0	26.5	39.8	31.4	13.6	1,779.9
1952	1,111.3	47.4	463.5	50.0	26.3	29.4	30.4	13.1	1,771.8
1953	1,021.8	48.3	419.7	45.0	26.0	30.5	29.0	12.3	1,632.9
1954	1,042.2	52.0	420.9	50.0	25.9	33.8	29.4	13.0	1,667.5
1955 2/	990.7	48.2	310.4	49.0	24.2	33.9	27.2	12.9	1,496.7
1956 2/	880.2	48.0	311.9	50.0	23.5	33.0	20.1	12.9	1,379.8
Percentage change									
	Per- cent	Per- cent	Per- cent	Per- cent	Per- cent	Per- cent	Per- cent	Per- cent	Per- cent
Average									
1947-49 to 1956	-11.4	-30.4	-28.0	4.2	-27.5	-23.1	-52.0	-12.8	-17.7
1955 to 1956	-11.2	-.4	.5	2.0	-2.9	-2.7	-26.1	0	-7.8

1/ Types 45, 56, 24, and 53 ended in 1939, 1948, 1949, and 1953, respectively.

2/ Subject to revision.

Table 24.- Tobacco: Yield per acre in the United States, by types, for specified periods with percentages

Period	Cigar								United States
	Flue-cured 11-14	Fire-cured 21-24 1/	Burley 31	Maryland 32	Dark air-cured 35-37	Filler 41-45 1/	Binder 51-56 1/	Wrapper 61-62	
	Lb.	Lb.	Lb.	Lb.	Lb.	Lb.	Lb.	Lb.	
Average:									
1924-28	676	767	807	781	784	1,340	1,256	1,041	765
1929-33	707	777	777	683	803	1,035	1,350	1,039	770
1934-38	856	811	819	749	837	1,266	1,465	954	865
1939	922	868	931	820	908	1,292	1,536	1,044	940
1940	1,025	888	1,045	850	905	1,337	1,530	922	1,036
1941	905	935	985	775	967	1,497	1,503	939	966
1942	1,024	982	980	740	1,037	1,249	1,520	963	1,023
1943	938	943	982	590	972	1,241	1,540	1,044	964
1944	1,069	1,022	1,189	850	1,116	1,440	1,548	1,075	1,115
1945	1,088	951	1,127	525	988	1,261	1,518	1,001	1,094
1946	1,137	1,189	1,256	925	1,215	1,469	1,519	1,000	1,181
1947	1,135	1,031	1,153	795	1,054	1,419	1,495	992	1,138
1948	1,233	1,170	1,396	750	1,165	1,566	1,524	998	1,274
1949	1,191	1,189	1,253	825	1,133	1,542	1,561	1,108	1,213
1950	1,312	1,102	1,222	800	998	1,474	1,548	1,130	1,269
1951	1,309	1,215	1,355	785	1,197	1,594	1,571	1,098	1,310
1952	1,229	1,228	1,403	805	1,286	1,590	1,532	1,124	1,273
1953	1,245	1,013	1,345	900	1,022	1,468	1,618	1,203	1,261
1954	1,261	1,197	1,586	875	1,317	1,681	1,642	1,264	1,346
1955 2/	1,497	1,353	1,514	725	1,284	1,569	1,546	1,209	1,467
1956 2/	1,474	1,358	1,556	925	1,340	1,700	1,549	1,249	1,471
Percentage change									
	Pct.	Pct.	Pct.	Pct.	Pct.	Pct.	Pct.	Pct.	Pct.
Av. 1947-49: to 1956	24.3	20.2	22.8	17.1	20.0	12.7	1.4	20.9	21.8
1955 to 1956	-1.5	.4	2.8	27.6	4.4	8.3	.2	3.3	.3

1/ Types 45, 56, 24, and 53 ended in 1939, 1948, 1949, and 1953, respectively.

2/ Subject to revision.

Table 25.- Receipts from Federal taxes on tobacco products, selected averages, and fiscal years 1945-56

Fiscal year ending June 30	Cigarettes	Cigars 2/	Chewing and smoking	Snuff	All other 3/	Total
	Thousand dollars	Thousand dollars	Thousand dollars	Thousand dollars	Thousand dollars	Thousand dollars
Average						
1925-29	280,594	30,576	64,727	7,033	1,666	384,596
1930-34	343,029	15,510	57,451	6,954	1,409	424,353
1935-39	456,908	12,677	54,712	6,677	1,214	532,188
1940-44	718,814	18,884	50,914	7,275	4,096	799,983
1945	836,753	36,678	49,574	7,741	1,399	932,145
1946	1,072,971	41,454	41,961	7,373	1,760	1,165,519
1947	1,145,268	48,354	36,548	7,054	544	1,237,768
1948	1,208,204	46,752	37,024	7,372	928	1,300,280
1949	1,232,735	45,590	35,435	7,272	843	1,321,875
1950	1,242,851	42,170	35,070	7,389	985	1,328,465
1951	1,293,973	44,275	33,870	7,235	1,043	1,380,396
1952	1,474,072	44,810	22,817	4,796	4/18,667	1,565,162
1953	1,586,782	46,326	17,244	3,821	738	1,654,911
1954	1,513,740	45,618	16,249	3,925	697	1,580,229
1955	1,504,197	46,246	16,153	3,909	708	1,571,213
1956	1,549,045	45,040	14,868	3,822	722	1,613,497

1/ Includes large cigarettes.

2/ Includes small cigars.

3/ Leaf dealer penalties, floor taxes, cigarette papers and tubes, etc.

4/ The extremely sharp increase in this total largely represents the collections of floor taxes on cigarettes following the rate increase that became effective on November 1, 1951.

Compiled from reports of the Internal Revenue Service.

Table 26.- Tobacco manufactures: Net sales, net income, and profit ratios, annual 1947-55, by quarters 1954-56

Year and quarter	Net sales	Net income		Profit			
		Before Federal tax	After Federal tax	Per dollar of sales		As percentage of stockholders' equity (annual basis)	
				Before Federal tax	After Federal tax	Before Federal tax	After Federal tax
	Million dollars	Million dollars	Million dollars	Cents	Cents	Percent	Percent
1947	2,641	178	109	6.7	4.1	16.6	10.1
1948	3,081	257	159	8.3	5.2	22.0	13.7
1949	3,061	250	156	8.2	5.1	20.2	12.6
1950	3,129	281	152	9.0	4.9	21.3	11.5
1951	3,329	294	129	8.8	3.9	21.8	9.6
Current series 1/							
1951	3,378	295	129	8.7	3.8	21.7	9.5
1952	3,702	285	120	7.7	3.2	19.8	8.4
1953	3,768	338	138	9.0	3.7	22.9	9.4
1954	3,672	329	156	9.0	4.2	21.5	10.2
1955	3,796	388	183	10.2	4.8	24.2	11.4
1954							
1	846	72	34	8.5	4.0	19.1	9.0
2	932	81	38	8.7	4.1	21.3	10.0
3	970	93	44	9.6	4.5	24.1	11.4
4	924	83	40	9.0	4.3	21.3	10.2
1955							
1	860	74	35	8.6	4.1	18.8	8.9
2	975	98	47	10.1	4.8	24.6	11.8
3	994	110	53	11.1	5.3	27.3	13.1
4	967	106	48	11.0	5.0	26.0	11.8
1956							
1	900	87	41	9.7	4.6	21.3	10.0

1/ Not strictly comparable to the series previously published for 1947-51, but differences in the current and previous series for 1951 are relatively minor.

Compiled and adapted from Quarterly Financial Report for Manufacturing Corporations, Federal Trade Commission--Securities and Exchange Commission.

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